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ABSTRACT

The paper discusses both European and American approaches to providing and funding recurrent educational opportunities for workers and their families. A section covers actions and studies of international organizations regarding paid educational leave and European attempts to increase educational opportunities through national and State legislation, private practice, and collective bargaining. A major portion outlines in detail educational plans of American companies and international unions; other sections discuss policy recommendations and strategies for implementation in the United States. Three basic recommendations are made: for a coalition among the educational world and the worlds of industry and labor (requiring a vehicle for communication among labor, management, government, and education); for agreement between labor and management prior to adoption of national or regional legislation; and for effective representation of the formal education system in such a coalition. Conclusions point out the paradoxical need for more expenditure on recurrent education in a time of economic crisis, and call for National Institute of Education aid in coordination, planning, and research in the United States. (MDW)

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Strategies for the Application of Foreign Legislation on Paid Educational Leave to the United States Scene

Dr. Herbert A. Levine

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SUMMARY STATEMENT

This paper relates to the American scene the concepts and relationships developing in Europe with regard to paid educational leave, recurrent and continuing education and other efforts to increase education and training opportunities for workers and their families.

Despite the most serious economic crisis since the thirties, the United States and European countries have greatly increased their expenditures for the education and training of those who work--or are looking for work.

Unfortunately, American and European experience with efforts to develop educational opportunity programs for workers and their families through legislation and/or collective bargaining highlights the separation of the worlds of work and education.

The educational systems, on both sides of the Atlantic, have been unable to relate themselves effectively to the educational needs of industry, labor unions and the adult worker. As a result adults whose education has been neglected become educationally handicapped manpower striving to find new places in the world of work.

In addition, the failure to integrate public resources with the enormous financial expenditures and entitlements in industry and union based educational opportunity programs has resulted in a waste of human and financial resources. It is a hard fact that working people have been unable to take advantage of seemingly available educational opportunities to educate themselves for career development, social advantage and individual satisfaction.

Central to the development of strategies for the implementation of paid educational leave, recurrent education and other educational opportunity programs for workers and their families is the forging of a coalition among the world of education and the two powerful giants of the world of work. All European experience points up the driving force of labor and management and the significant role they must play in any effort to implement work related educational opportunity programs.

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The questions of paid educational leave has not been dealt with in National or State Legislation in the United States except in some few areas of public employment. Nor has there been any vehicle or procedure for labor, management, government and educators to seriously discuss the issue.

It appears that the National Institute of Education has the initiative in the United States for developing any consideration of implementing the ILO actions on paid educational leave and for serious introduction of the concept of recurrent education. The NIE is especially fortunate in this regard to have as valuable a source of information and stimulation which comes from its close and useful association with the Organization for Economic Cooperation and Development-Center for Research and Innovation.

If there is anything that can be gleaned from the experiences of France, Germany, England and Scandinavia, it is the need for some national body, integrated with state and local bodies, to serve as prime discussant and mover of the idea of paid educational leave and its complementary education and work programs.

Second, it appears that, in most cases, a significant element in the successful adoption of national or regional legislation is the previous agreement of labor and management.

Third, it appears that in the above countries the formal educational system was not substantively represented in the discussions. While ministries of education were sometimes consulted and adult education (WEA) groups sometimes contributed, the driving force was in the hands of labor unions, management and the political parties.

Thus the relationships among labor, management, government and professional education are an important focus of the recommendations in this paper. Pp. 92-120.

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I. INTRODUCTION

This paper attempts to relate to the American scene the concepts and relationships developing in Europe with regard to paid educational leave and the effort to expand and deepen education and training opportunities for workers and their families.

It is concerned with the waste of human talents in the factories and workplaces of America and foreign lands and it suggests some possible efforts to mitigate the waste of financial resources available in the United States but not used by working people to educate themselves for career development, social advantage, and individual satisfaction.

It may seem a frustrating task to propose a social policy of cooperative effort to provide educational opportunity for workers and their families at the very instant when American and foreign workers are being presented with temporary and permanent layoff notices in such great number as to chill the blood of those who lived through the depression of the thirties.

There is grim comfort in the thought that while it might seem paradoxical, it is a practical necessity for societies wracked by economic strains to incur increased expenditures on education and training. It will be seen below that the Industrial Training Act in England and the French Law of 1971, both actions of conservative governments, were reactions to hard times and social tensions. The Congress of the United States has voted a

billion-dollar job development and unemployment insurance bill which has called forth articles, speeches, and reminiscences of federal expenditures on the WPA in the 1930's.

One distinguished actor, in the forefront of his profession today, recounts his personal experiences in that period in a recent Sunday New York Times. He writes of the tremendous surge of talent which burst forth under the sponsorship of Uncle Sam and of his unparalleled opportunity to see and act in superb theater. "It was the Federal Theatre's Center where performers who were not assigned went for their weekly paycheck, for casting calls, and for brush-ups of all kinds. Santelli taught fencing; Mary Tarcai, improvisation. There were classes in diction, voice projection, dancing, and gymnastics. There were vaudevillians, straight actors, circus performers, magicians, and opera singers. A few fledgling ballerinas were studying Russian." There were also courses available in vocational training of all kinds: typing, drafting, machine working; and in general adult education: art, music, literature, history, economics; and there was the high point of workers' education in the United States under the guidance of the great Hilda Smith.

Why the responsible parties don't provide these resources and creative efforts on a continuing basis in normal or affluent times is beyond the scope of this paper.

Nevertheless, the likelihood is that the U.S., ravaged by the most serious economic crisis since the thirties, with escalating inflation and increasing unemployment, will with renewed vigor, turn its attention to the education and training of the people who work--or are looking for work--in America.

A serious limitation to the ability of the U.S. to respond to these growing needs is the fact that the educational establishments in this or other industrialized countries have not been able to conceive or implement an educational system providing a healthy relationship between work and education.

As a consequence of this failure, when economic crisis forces the nation to face the distressing fact that millions of adult citizens are poorly prepared educationally for achievement and occupational mobility in our industrialized society, those in power, as well as those in need, turn away from the traditional agencies of education and, in fact, often take punitive action against them.

Adult citizens whose education has been neglected become neglected manpower and those public and private institutions and agencies concerned with the world of work provide training, education, and research in desperate efforts to mitigate the damage by "upgrading the work force" with or without the help of educational agencies.

The recent U.S. congressional action which provides for additional unemployment insurance follows a law passed a few months ago in France which makes it possible for all redundant workers to

obtain unemployment payments equal to their previous wage for a full year if work is not available to them. These emergency actions, and others which may soon be taken in the United States, France, England, Japan, Germany, and other industrialized countries who are now beginning to feel the shock of high levels of unemployment, are necessary measures because a workman and his family must first of all be able to survive. However, further action is immediately required to prevent these measures from becoming regressive and debilitating, not only for the individual workers but for society as a whole.

Education and training cannot be posed as solutions to waves of unemployment, but the crisis raises sharply poignant questions. Are the laid-off workers educationally equipped to find a new, useful, and personally rewarding place in our advanced technological society? Can they do the jobs currently available which call for special skills and education? Will they return to unskilled work, deprived of seniority, at a rate of pay considerably below their former income? Can they be retrained for short-term gain? How can there be initiated some form of long-term education and training system which will provide a labor force with increased skill flexibility and educational background suited to continuing adjustment in an automated society? What forms of education are required to help develop a citizenry sufficiently cognizant of economic, social, and political forces at work in modern society so

they can take a substantial role in attempting to resolve the nation's problems?

Thus in the midst of our severe economic travail, it would seem worthwhile to open a broad discussion in the United States on manpower education and training and to relate our experiences to those of other national centers. Some additional benefit might accrue, if serious consideration is given to attempts made by international bodies to seek out realistic goals and methods of providing educational opportunities to workers and their families.

This paper is presented in six sections. I. Introduction. II. The second section considers the recent actions of the International Labour Organization on paid educational leave and the advanced OECD-CERI studies of paid educational leave which were reported on and discussed in Paris in December 1974. It also reviews the attempts to increase educational opportunity through national and state legislation and private practice, including collective bargaining in France, Germany, England, and other European countries. III. The third outlines some of the more forward-looking American educational opportunity plans currently being offered as unilateral company or international union plans as these programs developed through the collective bargaining process. IV. Section four will consist of policy recommendations for paid educational leave and other forms of

educational opportunity plans for the United States. V. This section proposes strategies for the implementation of the proposed plans for paid educational leave and other plans designed to increase educational opportunity for workers and their families. VI. Conclusion.

II. INTERNATIONAL CONCEPTS AND PRACTICES

International Labour Organization

Over seven years of tripartite consideration by the representatives of government, labor, and management of some 130 countries were required to complete the process of initiating, analyzing, discussing, researching, negotiating, and compromising, and finally, in June 1974, to adopt both an ILO convention and a very substantive recommendation of paid educational leave.

Throughout the cumbersome procedures required before the ILO can take a significant international action, the representatives of labor, management, and government refined their areas of agreement and disagreement through working committees at the international level and through discussion, negotiations, and political activity in their respective national centers on methods of increasing the vocational, general, and civic educational opportunities available to workers in their countries with specific focus upon paid educational leave.

This international effort--which was, in the end, approved by all of the management, labor, and government members of the U.S. delegation to the ILO meeting--represents a forward step toward international understanding and action with regard to educational opportunity programs for workers and their families.

The preambles of the newly adopted ILO convention and Recommendation express the objectives of these documents by first of all

Considering that the need for continuing education and training related to scientific and technological development and the changing pattern of economic and social relations calls for adequate arrangements for leave for education and training to meet new aspirations, needs and objectives of a social, economic, technological and cultural character, and

Considering that paid educational leave should be regarded as one means of meeting the real needs of individual workers in a modern society.

In these documents, the term "paid educational leave" means leave granted to a worker for educational purposes for a specific period during working hours, with adequate financial entitlements.

Each member of the ILO is encouraged to formulate and apply a policy designed to promote, by methods appropriate to national conditions and practice and by stages as necessary, the granting of paid educational leave for the purpose of:
(a) training at any level;
(b) general, social, and civic education;
(c) trade union education.

The policy should be designed to contribute on differing terms as necessary -
(a) to the acquisition, improvement and adaptation of occupational and functional skills, and the promotion of employment and job security in conditions of scientific and technological development and economic and structural change;
(b) to the competent and active participation of workers and their representatives in the life of the undertaking and of the community;
(c) to the human, social and cultural advancement of workers; and
(d) generally, to the promotion of appropriate continuing education and training, helping workers to adjust to contemporary requirements.

The policy should take account of the state of development and the particular needs of the country and of different sectors of activity, of other social objectives, and of national priorities.

It should be co-ordinated with general policies concerning employment, education and training as well as policies concerning hours of work, with due regard as appropriate to seasonal variations of hours of work or of volume of work.

The means by which provision is made for the granting of paid educational leave may include: national laws and regulations, collective agreements, arbitration awards, and such other means as may be consistent with national practice.

It should be recognized that paid educational leave is not a substitute for adequate education and training early in life and that it is only one of a variety of means for continuing education and training.

The three most significant concepts included in the ILO actions which should concern U.S. policy makers are:

(1) Workers should have the right to educational opportunity without having to give up their jobs or sacrifice their income and other benefits.
(2) Workers should remain free to decide in which education or training program they wish to participate.
(3) Education and training programs should be developed with the threefold objectives of: (a) concern with the national interest, (b) the needs of the specific industrial enterprise and (c) the individual's self-improvement.

Organization of Economic Cooperation and Development-Centre for Educational Research and Innovation

It seems fair to say that the underlying hope of the delegates supporting the paid leave actions was that nations through attempting to deal with the recommendation of the convention would find their way toward a rational system for meeting individual, industrial, and social needs for education and training in each national center, in regional groupings, and in the world at large.

The OECD-CERI group, which convened in December 1974 to discuss the situation with regard to paid educational leave in six countries (Yugoslavia, Denmark, Sweden, Holland, Belgium, and Italy), emphasized the broader ramifications of the concept. It understood the ILO definition as it related to those at work in an industrial enterprise and recognized the difficulties, even within these limits, of making cross-cultural generalizations about how to translate conventions of international bodies into actual educational opportunities for workers.

But the OECD-CERI group chose not to define paid educational leave in the narrower sense of release from industrial employment only. It suggested that at this stage of international discussion the broader options should be held open. Thus the group was concerned about educational leave for housewives whose contribution to family development and the conduct of the household has been classified as work by many forward thinking persons. This form of paid educational leave was primarily to be the financial responsibility of public agencies, although it was noted that some private educational opportunity plans already provided by corporations unilaterally, or in agreements arrived at through collective bargaining, contain provisions which include educational benefits for the worker's spouse and children. (Two notable examples in the U.S. which are discussed later in this paper are the IBEW Local 3 program and that of the Kimberly Clark Corporation.)

The OECD-CERI group was concerned that paid educational leave rights and opportunities not by a system for widening the gap between the haves and have nots. It appears, at first view, that these opportunities are utilized more by persons of substantial educational background who are being encouraged by corporations and public employers to obtain more education. The OECD-CERI group raised the problem of migrant workers, young workers, farm workers, unemployed workers, women workers, foreign workers, and other workers who were deprived of the opportunity to reach even modest levels of educational achievement.

While the group supported the view that managements and unions should continue to negotiate paid leave benefits for their employees and members, they emphasized the necessity for public action to supplement private initiative and to establish a method to provide these opportunities for workers not covered by these relationships.

The OECD-CERI group agreed to sponsor further international discussion about the right of all persons to paid educational leave, the forms and methods for realizing this right, and the methods of financing it by private and public agencies. A significant aspect of these discussions will be the relationship of such opportunities to the larger goals of recurrent and continuing education as they relate to the total goals of a nation's educational system.

An important contribution that OECD-CERI hopes to make is to develop further research efforts to seek out the extent of worker participation in paid education leave programs, the quality of participation, the quality of available opportunities, and the degree to which the goals for individual freedom of choice, enterprise concerns, and national interest are fulfilled by these programs.

It is important to note that while the ILO convention and recommendation on paid educational leave are forward-looking, much of their basic concept and proposals for action are reflections of existing legislation and practice in various countries including America.

France

In France, for example, the exciting laws of 1971, which are themselves under current review and improvement, were the culmination of more than two decades of effort to improve continuing professional and vocational education in the country. Wracked by internal economic and social pressures, faced by international economic competition, and burdened with an educational system inadequately geared to the needs of industry and the trade unions or the skill requirements demanded of the individual worker, the major segments of French economic political life came to recognize the need to revise its legislation and private practice in vocational and further education.

In the early 50s and 60s only a few people in industry and unions and some professional educators called for substantive changes in form and practice. In 1966 a law was passed giving workers the right to study leave but no steps were taken to implement it. A law in 1968 offered a method by which public institutions could help private firms to fund the educational leave.

May 1968 marked perhaps the most turbulent economic, social and political conditions France has seen in the post-war period.

The aftermath of the events of May convinced even the more conservative elements that something must be accomplished in the industrial sphere to improve conditions in the workplace. By 1970, the leading French Confederations of Trade Unions and the French Confederation of Employers successfully negotiated a national agreement providing for paid educational leave for all workers covered by this collective bargaining process.

Thus the law of 1971 was adopted in a spirit of general accord among the political and economic power groups despite the reservations specific groups may have entertained about various aspects of the legislation.

The essence of the 1971 law established the right of workers to paid educational leave, subject to few limits. Some 11 million workers were covered in the initial period. Millions more have since been added by decree and common practice.

The law provided the funds to implement its provisions by ordering all companies with more than ten workers to dedicate a certain sum to training. The initial sum was .8 per cent of wages. The law provided for an annual upward adjustment of this sum through 1976 at which time it was expected that the percentage would remain fixed at about 2 per cent of payroll.

A third significant aspect of the French approach is the structure they have developed to control the system. The elements of this control system were evident as early as 1966. The whole is administered by an interministerial committee which meets regularly on national policy and interagency concerns. A permanent group of high-level civil servants and a fund management council for vocational and social advancement emanate from the interministerial committee. A general secretariat of higher civil servants in continuing session is the day-to-day operating organ of the system. A national council which meets annually is composed of some 150 people representing management, labor, professional educators, and public authorities. Its advice is sought on policies to be adopted by the interministerial council.

Attached to the national council is a permanent delegation which is composed of six representatives of management, six from the unions or professional organizations and one public servant. It meets with the permanent group of civil servants on a regular basis. This national system has branches in the provinces, local regions, and departments.

There are problems facing management, the trade unions, government, and the individual citizen in this effort to enhance educational opportunity in the mutual interest of all concerned. Areas of concern include the extent of control over training and education, the source and administration of funding, the determination of standards, and the quality and nature of training being offered. It is too early to write definitively of the course upon which the French have embarked. It appears that the greatest number of participants so far have been engaged in vocational and career training--the result of management-directed training efforts provided by in-plant training or through one of a rapidly growing number of private manpower training companies. It has been estimated that perhaps 1 or 2 per cent of participating workers have selected educational opportunities of their own choosing on their own initiative. Trade union members, professional educators, enlightened managers, and government representatives in France are seriously studying the accumulating data with a view towards making as real as possible the promise of the law of '71.

Germany

Germany, beset by a constellation of economic, social, and political considerations, has likewise engaged itself in a national effort to revamp apprenticeship and other vocational training programs. Within this context the German labor movement and

the Social Democratic Party have taken the initiative in developing a system of paid educational leave.

In 1969, the federal government adopted three significant laws in close order. These were the Labor Market Promotion Act of June 25; the Vocational Training Act of August 14; and the First Law Concerning Individual Promotion and Assistance of Education Act of September 19. These laws establish vocational training councils at the federal, state, and regional levels which call for representatives of management, labor, government and professional education to control and regulate vocational education. The acts provide workers undergoing training with stipends based upon formulae which include unemployment insurance payments. Allowances are, unfortunately, subject to family income levels. All workers who pay unemployment insurance are eligible for training. The programs are financed out of public funds and from the unemployment insurance fund in particular. Regressively, it is necessary for a worker to have been laid off or to have quit his job before entering training. While these acts represent forward motion in German vocational education and training, the labor-management committee structure does not yet work as effectively as needed. There is wide variation in the quality of training between regions and individual enterprises, and there are differing opportunities for workers in different parts of the country. Passage of the laws has revealed the need for vocational guidance and counseling and a shortage of vocational teachers estimated at 15,000.

Although the German trade unions and the Social Democratic Party advocated the provision of paid educational leave as part of the federal legislation, management, some professional educators, and the more conservative political parties successfully opposed reference to it in any of the three 1969 laws.

It is interesting to note the following description offered by Dr. Rudolph of some of their reasoning.

> On the question of initiating a program of educational leave there was a great deal of controversy within the scientific community as well as between labor and representatives of industry.
>
> Numerous social scientists argued in favor of removing the funding of such a program out of the shop or plant sphere in order to guarantee mobility between different plants and shops. They were basically skeptical (at least at the time, with respect to the feasibility of introducing a program of paid educational leave) because, among other reasons, of the lack of educational facilities. If there were to be any discussion of educational leave at all, then it ought to be limited exclusively to vocational training and education and made dependent upon the individual's willingness to pay part of the costs out of his or her own pocket.
>
> Representatives of industry, business and the trade guilds spoke out against the introduction of a program of paid educational leave for the following reasons:
>
> - -the costs would be prohibitive for smaller and medium sized businesses;
> - -there would be legal difficulties in preventing persons from taking unjustified advantage of the program;
> - -the willingness to go to school would certainly not be enhanced by making it a right, and finally
> - -there isn't really any need for legislation of this type in as much as advanced vocational training and adaptation in most cases is closely coordinated to the job situation and plants and shops - when necessary - already grant leave for this purpose to a large extent.

> It would be out of the question to ask business to finance aid for educational leave for socio-political education programs. The same doubts would hold true for any contractual solution for paid educational leave.
>
> Labor representatives, in their demands for paid leave for educational purposes, argued that educational leave as a constant upgrading of education would ultimately be more economical than re-schooling at various intervals in a person's life. Thus in terms of national economy paid educational leave was indeed a justifiable concept and a necessity in terms of labor market policy. With respect to the subject matter of educational leave programs, the strict differentiation between vocational and political education has become obsolete anyway. In any event, it must be recognized that aid and assistance for vocational training and education would certainly enhance the chances for positive economic growth, whereas it is not at all clear that this would result in favorable distribution effects for the insured labor force. To that extent, the costs of qualification would indeed be socialized, whereas the benefits (at least in part) would flow into the companies and businesses.

Despite these attitudes, the Social Democratic representatives engaged in drafting the 1968 legislation made several attempts to obtain some aspects of a paid education leave provision. At one point, the Social Democratic Party faction presented a motion to expressly provide for a right to leave for the purpose of attending vocational training programs for a period of up to ten days within each calendar year in the text of the bill. This motion was rejected by the CDU/CSU and FDP majority on the committees. The arguments against such a provision touched upon the following points: any such provision would encroach upon the private work contract between employer and employee, important preliminary questions (such as quotas of workers to receive paid leave, models of selection of

participants, etc.) had not been sufficiently clarified, and finally it would still be necessary to clear up the question of vocational training leave for other purposes.

> The aid for vocational training programs under the auspices of the Labor Market Promotion Act discussed above represented a step ahead in that it provides for the subsistence of the wage-dependent during their participation in vocational training programs. And yet the program is still unsatisfactory because it does not include non-vocational education and training and because it provides no right to leave for educational or training purposes.
>
> The unions raised a strong demand for the guaranteed right to "educational leave" during the latter part of the Sixties. Indeed, by 1969, educational leave had been agreed upon in a total of 118 union contracts involving some 2.6 million employees, only a fraction of which, however, provided for paid leave. They also tend to be quite restrictive with respect to the length of leave and the permissible programs for which leave will be approved.
>
> City, state, and federal officials and employees have a right to up to six working days educational leave for scientific meetings, vocational and political training and education programs as well as for the study of foreign languages.
>
> The intention of the SPD-faction in the Bundestag to include the right to educational leave for all the wage dependent in the Labor Market Promotion Act was unsuccessful - as was pointed out above - due to the opposition majority in Labor Committee. The only remaining solution was to recommend to the unions and to business and industry organizations that they include educational leave in their contracts. This did not take into consideration that labor contract provisions for educational leave have significant disadvantages in comparison to a legislative solution to the problem:
>
> - Due to the large number of union contract regions, the chances of achieving unified agreements is very slight.
> - The introduction of educational leave into regions with acute or potentially acute structural problems is highly improbable.

- Agreements granting educational leave secured by union contract negotiations would initially benefit a limited number of persons, but at the same time it would diminish the potential for wage increases for everybody.

Finally, only those gainfully employed would benefit from union contract agreements.

When the German Education Council (Deutscher Bildungsrat), the Federal and State Commission for Educational Planning (Bund-Lander-Kimission fur Bildungsplanung), and the federal government, in its report on educational policies came out in favor of educational leave, it was generally felt that the federal legislature would take the initiative in this field. In 1971/72, in the Federal Ministry of Labor, the estimated costs of paid educational leave were tentatively calculated according to varying rates of participation and for different lengths of leave. This period of activity was followed by remarkable silence. It may be that the federal government was shocked by the enormous costs of such a program (although there is disagreement as to how high these costs would really be). Management representatives and the employers had launched a full attack against the idea pointing to the costs to business and industry it would entail. It also became evident to the unions ultimately that they neither possessed the facilities nor the personnel capable of dealing with and providing for educational leave for everyone.

Berlin was the only state to adopt legislation granting educational leave to young workers. This took place in 1970 after the Berlin Vocational Education Act (Berliner Berufsbilungsgesetz) had gone out of effect having been superseded by the Vocational Training Act (Berufsbildungsgesetz) in 1969. In 1973, a number of states presented drafts of legislative solutions to the problem of education leave, two of which have already been passed into law, others of which are to become law in the near future. These initiatives came not coincidentally at the same time as general elections for the legislatures of the states!

A critical survey of the acts and drafts for legislation reveals that the obsolete (and yet traditional in Germany) differentiation between vocational education and general

> or socio-political education is to be done away with. On the other hand, neither with respect to the amount of leave provided for, nor with respect to those persons entitled to participate in the programs. The fact that, despite all the limitations, numerous bottle-necks and problems would arise if all of the potential participants were to take full advantage of their rights in the first year of the program leads to the suspicion that election tactics played a certain role in the passage of this legislation. It remains to be seen whether or not to what extent this legislation will lead to an accelerated expansion of educational opportunities.

England

England, with its long tradition of private and public support to education, has nevertheless only recently come to grips with the problem of vocational education and training. The most recent efforts are contained in the 1964-1973 Industrial Training Acts. These laws have attempted to increase the amount of training opportunities, improve the quality of training, spread the cost of training more evenly, and assure the development of reasonable standards of performance in the training area while at the same time providing maximum freedom to the industry, and introducing the concept of the Levy-Grant System of financing vocational education and training by establishing training boards composed of representatives of government, management, and labor, and professional educators.

The British acts have focused attention on the national interest and needs for vocational training which sometimes appear in conflict with the policy or program of the specific, individual enterprise. The training boards established under the act serve

as proving grounds for labor, management, and government representatives to assess and experiment with vocational education and training.

While the act has created an awareness in some industrial and commercial enterprises as to the value of training, others, particularly smaller firms, simply paid the required levy and did no training. The act established an employment service agency to concern itself with jobs; a training service agency to supervise and support the training boards, and an agency to monitor the Levy-Grant-Exemptions system which was the focal point of the 1973 revisions of the 1964 law.

The Industrial Training Act, while a great step forward toward rationalizing vocational education and training in England, did not concern itself with paid educational leave nor has it become, as some professional educators had hoped, the basis for building a national adult education program for workers in British industry.

However, a feature of the new 1963 legislation known as the Training Opportunity Scheme may enhance the individual worker's opportunities to engage himself in career education programs of his own choosing. The British have also developed an amazingly successful day-release program which permits limited numbers of specified groups in the industrial enterprise to engage themselves in educational effort on paid released time from work. These programs are generally available through the technical schools and colleges and

are publicly funded under education acts not related to industrial training.

Paid educational leave in England, as in other countries, is available through directed management training and career development programs. Educational leave without pay is generally available to trade union leaders to attend union resident schools, conferences, or other educational activities. These leaves are sometimes financed by management as a result of collective bargaining agreements. Where they are not, the trade unions reimburse their representatives for loss of income and expenses.

III. EDUCATIONAL OPPORTUNITY PROGRAMS IN THE UNITED STATES

The formal school system of the United States--including the adult educators, colleges, and universities--had made little serious effort to tap the extensive resources contained in educational opportunity programs provided unilaterally by American management or through collective bargaining agreements with American labor unions. This fact is all the more regrettable since it is apparent that only a small percentage of American workers are able to take advantage of seemingly readily accessible educational opportunity.

These educational opportunity programs cover almost every conceivable form of education and training including basic literacy; high school equivalency; vocational, technical, and career education; college-level, advanced degree, and post-doctoral study and research for workers; and in some instances, for the families of workers. These opportunities are generally made available for part-time, after-work study, but, depending on the educational level, the needs of the company, and the provisions in the collective agreement, employees are provided with paid leaves of absence, released time from the job, and on-the-job training and education.

Unfortunately, these programs are independently conceived and administered unilaterally with little or no cooperation among corporations, educational agencies, unions, or government. There is no common meeting ground for discussion of the successes or

failures of these programs, for joint experimentation, or even for the sharing of information in the mutual interest of all parties. Unilateral programming, in terms of special interest and resistance to cooperation with government or with each other, has occasionally been breached ineffectively by such attempts as the "plans for progress" program and other specialized efforts for minority group training and upgrading programs. Unlike many European countries, there is no regularly functioning body composed of appropriate representatives of management, labor, government and professional education which could provide a forum for a continuing discussion of educational opportunity programs. There is no management organization which can assert a national position on the specifics of collective bargaining or on a national educational opportunity program such as those which exist in Denmark, Sweden, France, and other countries. The AFL-CIO would not consider, much less attempt to negotiate for its constituent international unions as do the national union centers in Scandinavia, France, Israel, and other countries.

Despite the fact that the U.S. has not yet achieved a national planning mechanism for initiating, administering, and evaluating educational opportunity programs, the availability of educational opportunity for workers and their families can be compared favorably with what actually exists in most countries.

The following brief review of American management and labor efforts will highlight the fact that a number of innovative programs are being offered to American workers and their families through unilateral actions by one of the parties or through collective bargaining agreements. Hopefully, such a review will stimulate consideration of some form or forms of integrated effort to promote and improve such programs in the U.S.

Collective Bargaining and Education

In its report on Training and Retraining Provisions in Major Collective Bargaining Agreements, the U.S. Department of Labor, Bureau of Labor Statistics, "examined 1,823 major collective bargaining agreements each covering 1,000 workers or more." The 1969 study indicated that "fewer than 20% (344) of the 1,823 major collective bargaining agreements contained training or retraining provisions." These applied to 2.4 million or 32 per cent of the 7.3 million workers. The report further pointed out that training and retraining clauses were concentrated in six industries each, which accounted for 20 provisions or more. These industries included transportation equipment, communications, machinery (except electrical), primary metals, and food. "Significantly," notes the report, "these are industries which have experienced continual technological development and accordingly have required (1) programs to upgrade and keep skills current and/or (2) programs to replace obsolete skills for the technologically displaced. In total, the

six industries represented over half the training clauses and nearly three-quarters of the workers covered (72.5%). Auto and steel agreements accounted for almost over half of these workers."

A 1974 printout of the BLS provides a five-area breakdown of the educational opportunity clauses in major collective bargaining agreements, each covering 1,000 workers or more. It also reveals that some companies and workers are covered by these agreements.

The five areas include: (1) Educational leave, 138 companies (1,513,950 workers); (2) Apprentice training, 563 companies (2,855,550 workers); (3) Training, 519 companies (3,222,250 workers); (4) Tuition aid, 88 companies (831,550 workers); (5) Training funds, 34 companies (153,850 workers).

It can be seen at a glance, even from the limited statistics available to the BLS, that a considerable number and variety of educational opportunities have become the subject of collective bargaining. This fact will be reinforced by the discussion which follows. It should be noted at the outset, that only a few outstanding examples have been included. Very little is mentioned about (2) Apprentice training and (3) Training, although these are both significant aspects of educational opportunity for American workers and they are areas within which much activity and innovation is taking place. It is hoped that the emphasis on (1) Educational leave, (4) Tuition aid, and (5) Training funds will suffice to make the case for this paper. Hopefully too, a study

or studies will be forthcoming in the near future to provide concerned parties with the number, depth, and quality of all extant educational opportunity programs.

Educational Leave

The following briefly outlines the American orientation to educational leave and provides some examples of paid and unpaid leave in the public and private sectors of our economy. It points up, rather than minimizes, the need for a study of educational leave in the United States. Like our European counterparts we know little about the participation rates among those eligible for leave; what kinds of people take leave, and for how long a period. We are unable to assess the costs in direct financial aid or in production man hours lost, for these figures have not been compiled. It is possible that these figures are obscured even within the specific enterprise or public agency granting such leaves.

The ILO and the OECD-CERI group have set as their next task, an international study of the educational leave participants in those countries where national or state Legislation or collective bargaining agreements appear to offer the right to educational leave.

It is highly probable that the National Institute for Education sponsored conference of September 1974 was the first formally convened meeting in the U.S. to discuss such leave that included educational practitioners from management, labor, and government,

and professional educators. It is true that there was some discussion by the U.S. delegation to the ILO and some papers were roughly drawn up to express their position, but these did not reach very far beyond the delegation and some staff members. An extended discussion of the nature and character of educational leave opportunities and practices appears to be warranted and probably should be carried out in cooperation with OECD-CERI.

The American practice seems to emphasize the ILO conception of paid educational leave. Special efforts to upgrade minority group members through training programs calling for released time participation, programs designed to educate women workers who remain on seniority-based recall lists, and pre-retirement and veterans leave programs indicate, however, that the larger social purpose concept of OECD-CERI might be reinforced by some actual practice in the U.S.

In the largest part, American leave provisions cover employed workers who are eligible for the leave based upon a minimum of job seniority. Leave is granted by public agencies and private enterprises for (1) vocational and career education, (2) college education which stresses career advancement, and (3) for trade union education.

When a worker is on a paid leave of absence, his right to return to the job is generally protected within some limits, seniority rights are almost always maintained, and in some cases

are permitted to accumulate during the study leave. Pension rights and insurance benefits appear to be most often maintained by the company.

Educational leave opportunities in the private sector of the American economy are not the consequence of any federal or state law. So far as can be determined at this point, no such law has so far ever been considered by a legislative body in the U.S.

This benefit is usually provided for management-level or highly skilled employees and usually in companies which also provide an extensive program of employee education and training. In a growing number of situations, educational leave opportunities have been written into the collective bargaining agreements between individual corporations and unions.

There exists, however, legislation, presidential executive order, and civil service regulations in the public sector which provide for educational leave for public employees who require education and training to improve their job performance or to develop their capacity to assume greater responsibilities. The Government Employees Training Act (Public Law 85-507) Executive Order 10800, presidential policy, and civil service regulations are cited as examples of these opportunities. State administrative bodies also provide opportunities for education and training.

The Government Employees Training Act provides that each agency of the federal government:

> . . . shall prepare, establish and place in effect a program or programs, and a plan or plans thereunder . . . for the training of employees in or under such department by, and and through Government facilities and non-government facilities in order to increase economy and efficiency in the operations of the department and to raise the standards of performance by employees of their official duties to the minimum level of proficiency.
>
> Section 10 of the Act further provides that employees being given the training can be paid all or part of his salary or compensation. Moreover, expenses necessary to training such as travel and per diem, transportation of family, household effects, tuition, books and materials, etc., may also be paid by the Government.
>
> Some statistics available for 1964, indicate that:
>
> Nineteen Federal agencies authorized 509 employees to take special advanced training. This involved the granting of long term leave with pay. Four agencies accounted for nearly 80% of these totals: the Department of Defense (239), National Aeronautics and Space Administration (60), Agriculture (52) and the Department of Commerce (50). Of the 509 employees who received this training, 375 or 74% were employed as scientists and engineers or as technicians who provided support to scientists and engineers. The next largest group, 63 or 12% occupied executive or administrative positions.

Other examples of federal support to education and training are the Welfare Amendments of 1962 (Public Law 87-543) which provide federal matching funds to state and locally administered training programs which emphasize the enhancement of professional qualifications of social welfare personnel. Under these provisions the Middlesex County Welfare Board in 1974 "voted to raise the stipend to staff members on educational leave from $500 to $600 a month. The $100-a-month hike now affects some 10 staffers in graduate social work programs."

Despite the fact that statistics are not available, this form of public and private expenditure on paid educational leave represents allocations made for the purpose of improvement of job performance and career development.

Another, rather substantial, sum is that which trade unions expend for paid educational leave for trade union representatives at all levels to attend labor education activities.

Some twenty to thirty thousand trade union leaders are authorized by corporations each summer to take educational, union, or personal leaves of absence to attend the union's one-week residential schools often conducted in cooperation with a state university or college.

The union pays the wages, expenses, and tuition costs of the resident school. The company simply continues the employee's insurance and other benefits without interruption. Seniority is not affected by these short-term programs. Unions also very often conduct steward training programs, conferences, and short-term resident programs for specific leaders, such as a three-day program for local union trustees, or pension specialists, or education counselors. In these cases, companies allow the time off and the union finances the activity and provides wage reimbursement to the student. In some instances unions and management formally or informally agree that management will continue to provide the employee with his weekly salary and the union will pay all other expenses of the program.

It might prove beneficial to examine in some detail some key collective bargaining agreement clauses which highlight various kinds of paid or unpaid educational leave opportunities.

As indicated above, some 138 companies have agreed through collective bargaining to provide educational leave to the 1.5 million workers covered under these agreements.

Employers rarely raise any objection to paying lost time to an employee, or even overtime wages, provided the individual is pursuing a course of study or training desired by the employer.

> Employees released from their normal work within their basic scheduled work periods and instructed to attend training courses and technical conferences as defined below, having to do with job qualifications or improvements, shall lose no basic scheduled pay for the time necessary to attend such meetings. If, however, such meetings extend beyond the employee's basic scheduled work period, the employee affected shall be paid the premium rate of time and one-half for actual time spent at such meetings outside of his basic scheduled work period. If such meetings are held completely outside of the employee's basic scheduled work period (such as evening for a day worker or on an employee's day off that cannot be rescheduled), then the employees so affected shall be paid at the time and one-half rate for the actual time spent at such meetings.
>
> The parties agree that the company shall operate a training program, if needed for the licensed deck officers to be assigned by the company, in cooperation with the union to mechanized, semi-mechanized or retrofit vessels. It is understood that as part of said training program, the licensed deck officers assigned by the company to said program shall be paid their base wages, lodging, and subsistence.

A General Motors-UAW provision seems to have developed out of concern for veterans' benefits and then to have been applied to

all who attained seniority rights. It offers the possibility of leaves which exceed one year. An important aspect is the fact that seniority accumulates during the leave.

Educational leave of absence was written into the contracts signed by GM with the UAW and the IUE in 1967. The clauses cover:

> Employee veterans who have acquired seniority and other employees with seniority of one or more years who desire to further their education may make application for a leave of absence for that purpose.
>
> One continuous leave of absence for such education will be granted to eligible employees for a period not to exceed twelve months, subject to the conditions set forth in Paragraph III of this agreement. Additional leaves of absence may be granted, at the option of Local Management. Seniority shall accumulate during such leaves of absence.

The J.I. Case-UAW clause is significant in that it provides an orderly system for a leave of absence up to four years and because it attempts to provide financial assistance by making part-time or periodic employment available to employees on leave. The leave appears to be limited to a college career program.

> For the purpose of enabling an employee who had completed at least one year's service to pursue an educational program toward a college degree, the company shall grant a leave of absence upon application of the employee. Such leave of absence shall not exceed one year; however, this leave may be extended from year to year for a maximum of four years provided application is made prior to the expiration of such leave and the employee can show proof of satisfactory grades and has not accepted full-time employment elsewhere. An employee on educational leave shall be offered suitable summer or temporary employment when such is available. However, he may not exercise seniority to displace another employee during such periods.

A UAW-Bendix Corporation clause provides for educational leaves which can be extended beyond one year. It also limits the right of an employee who has returned to work to receive another leave by requiring at least one additional year in the work place. A weakness in the clause is the requirement that the worker be technically classified as a voluntary quit. This approach adds to the anxiety of the worker as to whether or not he will be re-employed. The clause offers the rehired employee the seniority he held when he commenced his leave but seniority does not accumulate for the period of the leave.

> Educational leaves of absence will be granted to employees with one (1) year or more of seniority, upon timely application therefore, for full-time attendance at an educational or training institution. Effective on the date of commencement of such leave, employees will be treated for all purposes as voluntary quits except as they may fulfill conditions outlined below for return to employment. If such a leave extends beyond one (1) year, it must be renewed annually. An employee granted an educational leave who returns to active employment will not be granted another such leave for at least one year.
>
> If, within thirty (30) days of an employee's cessation of such educational pursuit, he applies for re-employment at the Division or Plant granting such leave, he will be re-employed in accordance with the normal employment standards of the Division involved. Upon application for re-employment the employee will furnish proof from the school attended of his full-time attendance and the period of such attendance.
>
> If re-employed, the employee will be credited with the total amount of seniority held at the time of the commencement of such leave.
>
> It is understood that such leave shall be granted only where the requirements of the Plant permit and replacement employees are available.

A rather large number of companies and unions negotiated special educational leaves of absence for veterans. The following is a typical clause:

> Leaves of absence for Veterans, whose present seniority predates their military service (this shall not be retroactive), shall be granted as follows:
>
> 1. The employee must present bonafide evidence that he is entering an approved Training School. The question of whether the Training School is approved will be mutually agreed to between the Company and the Union.
>
> 2. When the services of the employee are not immediately required and there are employees within the plant capable of doing his work.
>
> 3. Any Leaves of Absence granted shall be for a period of one (1) year. This may be renewed within five (5) days of the expiration of his leave and fulfills the requirements of Paragraph 1 above.
>
> 4. Veterans granted Leaves of Absence as herein outlined must report back to the Company available for work within thirty (30) days after completion of their course, otherwise they shall forfeit all of their seniority rights. Any digression from the procedure must be mutually agreed to by the Company and the Union.

A series of clauses in the Douglas Aircraft-UAW agreement spells out a reasonable educational leave provision. The question of payment of wages is not mandated nor is it ruled out by the contract.

> (a) Eligibility: An employee with at least ninety (90) days continuous employment may, upon written request, be granted an educational leave of absence. Such leaves shall be limited to situations where the employee would be required to devote time during his working hours to the pursuit of learning at an institution acceptable to the Company.

(b) Proof of Enrollment: To qualify for such leave, the employee must submit sufficient proof of enrollment in the institution at least thirty (30) days prior to the commencement of instruction.

(c) Duration: Such leave shall extend for the period of attendance or thirteen (13) months' period whichever is the shorter. The Company may extend such leave upon written request where good and sufficient proof is presented that such extension is for the purpose of continuous attendance at the educational institution. In no case shall such leave extend beyond a total of twenty-two (22) months.

(d) Rights on Return: Upon expiration of such leave or termination of attendance, the employee shall be entitled to exercise his seniority in his former job occupation in accordance with applicable contractual layoff and displacement provisions, provided the employee, within ten (10) days after termination of such attendance notifies the Company in writing of his intention to return to active employment within thirty (30) days of the termination of such attendance. Upon return, the employee shall be required to furnish good and sufficient evidence of the term of attendance at the institution.

(e) Change of Institution: Should an employee wish to change institutions during the term of such leave, he must notify the Company of such intent in writing with full and complete information relative to the new institution and the reasons for such change. Such leave shall remain in effect only where the Company approves such change.

Most companies appear to consider leaves of absence as justified for academic study or in resident trade schools. The UAW-International Harvester agreement illustrates this view.

A leave of absence for a period not to exceed one (1) year without loss of seniority will be granted an employee who has at least one (1) year of seniority in order that the employee may attend a recognized college, university, trade or technical school full time provided that the course of instruction is related to the employee's employment opportunities with the Company. A request

> for a leave of absence to attend primary or high school will be regarded as being within the intent of this Subsection (b) and the schooling will be regarded as being related to the employee's employment opportunities with the Company. Before receiving the leave, or an extension thereof, the employee shall submit to the Company satisfactory evidence that the college, university, or school has accepted him as a student, and on the expiration of each semester or other school term, shall submit proof of attendance during such term. Such leaves may be extended for additional periods not to exceed one (1) year each.

A significant feature of this agreement was the fact that the company and the union considered using other fund accumulations (SUB) to finance their educational activities. The clause also openly suggests that education and training not only enhance careers but reduce the danger of layoffs.

> The Company and the Union have agreed to establish a Career Employment Planning Program to be incorporated into the local working agreements.
>
> The purpose of the program is to prepare the individual employee to meet job requirements on more desirable jobs and the demands of new jobs arising from automation and other advanced in technology. The program will be designed to enable the employee to improve his knowledge and skills, thus enhancing opportunity for advancement and reducing the danger of lay-off due to inability to meet job requirements.
>
> Training programs will be provided either "on the job" or in auxiliary locations away from the job utilizing special equipment and instructors.
>
> Applicants will be chosen in line with seniority to be trained on jobs of their choice and will in all circumstances be supplemental to the required number of employees to meet production requirements.
>
> With regard to financing the Career Employment Plan, the Company and Union may consider, among other devices, the use of the SUB Fund provided for in Article V of this agreement.

> In order to implement this projected program the Company and the Union shall meet as soon as possible to negotiate the details of the program and put it into effect.

Perhaps the most unique collective bargaining clause is that which provides for an optional leave program which can be taken by senior employees at a time of layoff. This helps keep younger workers on the job and it means full income maintenance for the worker who voluntarily takes optional leave. This program was signed into agreements between the UAW and the Mack Truck Corporation and has since been negotiated with other companies.

> Effective November 1, 1974, the order of lay-off has been reversed under the new Optional Leave Program. Should a lay-off be scheduled to take place from any bargaining unit, of any employee with one or more years of service, the longest service employee in that same classification, in the same department, with ten or more years of service, may, at the employee's option, elect to take the lay-off instead. The lay-off may range from a minimum of eight (8) weeks to a maximum of thirteen (13) weeks.
>
> This Optional Leave Benefit is unrelated to any unemployment compensation system requirements or the rules of the Supplemental Unemployment Benefits program. The employee is not required to report to the Company and for the period of the leave the time is strictly the employee's own. The rate of pay for the Optional Leave is the same as the weekly sick and accident benefits.

A comprehensive and straightforward clause on paid educational leave was negotiated by the Hospital and Institutional Workers' Union Local 250, AFL-CIO and the Kaiser Foundation Hospitals.

> Article XVIII - Paid Educational Leave
>
> After the completion of two (2) full years of service, employees shall begin to earn one (1) week paid educational leave per year accumulative to the maximum of

> four (4) weeks. Service accrued prior to November 1, 1970 shall count towards the maximum of three (3) years (two year waiting period plus one week accrued leave which may be taken during the period of this agreement). Paid educational leave may be taken by full days or by hourly increments as time away from the job.

District Council 37, AFSCME, whose exciting educational program based upon a negotiated training trust fund is discussed elsewhere in this report, protects time spent on paid leaves of absence from encroaching upon regular annual leave credits.

> Employees who are on agency approved work-study paid leaves of absence shall not have annual leave credits deducted unless they actually request and take such annual leave.

Local 1199, Drug and Hospital Workers Union, which bases its health career-oriented training and education program on a percentage of payroll contribution by management to a training fund, provides for financial assistance to those engaged in full-time study.

> Students in full time study programs sponsored by the Fund are released from their hospital jobs and receive a training stipend of 85 percent of their net salary from the Fund. Students continue to receive all union health benefits, vacations and holidays and continue to accumulate service credit under the Local 1199 Hospital Pension Fund. Taxes are not removed from the stipends since the bulk of the money is tax free.

The materials in this section are an illustrative rather than a definitive presentation of the status of paid educational leave in the United States. It might be appropriate to conclude this section with a reference to the situation in the American

teaching profession which has integrated paid educational leave (sabbaticals) into its work pattern.

It is reported in the press of Wednesday, January 1, 1975 that some 400,000 members of the National Education Association are eligible for a sabbatical leave. Some 50,000 of these are on leave at any particular time. These figures would be increased if all teachers and professors were included.

It is also interesting to note here that the American Federation of Teachers' new "Educare" program includes the demand that a system of "worker sabbaticals" be established in the United States.

Tuition Aid

Originally conceived as an employee benefit, tuition refund programs in the United States have come to be viewed as a training tool. Over the years, most American corporations have broadened the tuition refund opportunities to include all their employees. The types of courses workers can pursue are less restricted and the financial payments have been increased to pay the largest share of the costs including, in some cases, tuition, fees, books, travel, and subsistence costs. Some companies permit a limited number of paid hours off the job to employees participating in a specialized study program. Despite the general easing all along the line, participation in programs of this type has been at the median rate of only 4.4 per cent of those eligible.

Roger O'Meara tells us in a 1970 NICB study that

The tuition-aid allowances paid to employees participating in the plans of 162 companies during 1967 totaled nearly $17 million. Available figures show that, in the median company, (a) tuition-aid plan costs equaled .04% of payroll costs; (b) the highest allowance paid to a single employee was $657.50 and the lowest, $13.75; (c) the average payment per plan participant was $120.65; and (d) the average payment per eligible employee was $4.91.

Most companies find their plan costs go up from one year to the next. They ascribe this to the unrelenting rise in tuition and other school charges, the recurring necessity for liberalizing plan benefits, and the accelerating growth in the number of employees intent on continuing their education.

Plan Results

Available employee participation rates, for the most part, antedate the intensified efforts that many companies are now making to promote their plans on a broader scale. In 1967, the median rate of plan participation among eligible employees in 155 companies was only 4.4%. A majority of the participants were salaried, male employees; half of them, engineers, scientists or technicians, and about a fifth, supervisors.

On the whole, the 4.4% rate represented an increase over previous years. Many of the companies, however, expect far more substantial increases in the years ahead. They cite the improvements constantly being made in plan benefits, the development of new and better promotional techniques, the more active hand that supervisors are taking in supporting the plans, the proven attraction that master's and doctoral degrees have for newly hired college graduates, and the growing awareness among employees at all job levels that continuing education will help them get ahead.

How well a plan is achieving its objectives defies accurate measurement. Too many intangibles are involved. It would be impossible, for instance, to determine precisely how much the new knowledge that an employee acquires in a tuition-aid course contributes to improving his productivity, bolstering his morale, or enriching his life.

> Despite the absence of such evidence, 35 companies voice complete satisfaction with the results of their plans. A utility, for example, is convinced its plan "does work--and is worth every cent is costs."
>
> Many other companies are more restrained; they say they are pleased with the way their plans seem to be working out. But they emphasize the word seem, explaining that the lack of objective measuring tools leaves them dependent on subjective impressions.

Well-intentioned, powerful companies not usually accustomed to having any of their programs fail, are puzzling over their inability to increase participation in tuition refund programs. Perhaps one might increase participation through educational counseling; helping workers to establish realistic, more readily attainable educational goals; released time to register for and pursue courses; incentive payments for goal completion; and some form of company recognition of the individual's efforts through increased income, job responsibilities, or scholarship for further study. Some research and experimentation in this area would be helpful to all concerned. For the present let us explore the nature, content, and problems of two prominent attempts developed through collective bargaining.

General Motors-UAW Tuition Refund Plan

Background:

The General Motors-UAW tuition refund plan was negotiated for the first time in September 1964. It was developed out of a company need for employees with specialized skills and as a result of UAW concern for the education of its members. The plan, which

originally provided tuition refunds of up to $250 per calendar year, was changed in collective bargaining sessions in 1967 to $350 maximum; 1971 - $500 maximum; 1973 - $750 maximum. In these negotiations the UAW brought additional educational demands to the table. These included educational leaves of absence--particularly for veterans--which were written into the agreement, and apprenticeship and upgrading training programs upon which some agreements were reached. In the 1970 negotiations the UAW proposed that a training and education fund be established. No agreement was reached on this proposal. In 1973 a new hire orientation program was added to the contract. This program was to be provided jointly by the company and the union.

During this period the company unilaterally provided management training programs, scholarship, and fellowship programs, and other programs thus far not subject to the collective bargaining process. The union conducted its own labor education program which at one point was estimated to cost $750,000 a year. The addition of the Walter and May Reuther family education center has increased the union's annual expenditure on education.

Rationale:

General Motors:

General Motors Corporation, as a part of its continuing effort to encourage employee development, established a tuition refund plan for its hourly-rate employees in 1964. The purpose of the plan was to provide financial assistance to an eligible employee who desired to further

his training and education through spare-time, job related or basic education courses. This plan was changed in 1967 and has been revised again through the joint efforts of General Motors and the Union.

United Auto Workers:

As UAW members we are all aware of the tremendous impact that automation, technological progress and the ever increasing degrees of cybernation have made upon the work place in our industrial society. . . . We live with new technologies, skills and unlimited possibilities of the space age scientific-industrial world today. This rapid expansion of technology has done much within the last decade to eliminate thousands of "old jobs," automating them, producing far more output with less labor and causing drastic changes in Job Skills requirements. Moreover the emphasis upon education as the surest means of ensuring job security, promotional capability and worklife opportunities is now receiving more intensive attention than at any other time in our history. In 1964 the UAW recognized the necessity of providing a contractual means to enable its members to acquire new, different or increased skills and knowledge to meet both the challenges and opportunities of such technological changes. . . . In 1967-68 negotiations the UAW vastly improved upon the original language of the Tuition refund program. . . . UAW members . . . rightly view the tuition refund program as providing the "golden key" to unlock the door of opportunity, education and higher skills to them.

Eligibility:

An employee . . . must have seniority during the entire period of a course of study and be in active service at the beginning of the course for which tuition is to be refunded. Employees not considered eligible for this program are: temporary employees, students dividing their time between studies in a recognized educational institution and work in a Corporation plant or office, employees on educational leaves of absence or leaves of absence for union activity, for public office or for military service.

Further an employee must obtain corporation approval prior to undertaking a course for refund. In order to receive a refund the employee will provide evidence that the course was completed on a basis satisfactory to the company.

Unique Features:

A. An employee will receive a refund of the full amount of the tuition and compulsory fees for an approved course or courses up to a maximum of $250 during the calendar year ($750 for the calendar year for courses at an accredited college).

B. The Tuition Costs are reimbursed upon the completion of each course, term or semester.

C. If an employee is not in active service at such time (laid off), payment will be made provided the employee has seniority recall rights and he had commenced his program while in active status.

D. An interesting feature is the application of the tuition refund program to apprentice training.

This will confirm our advice to you in our recent contract negotiations that subject to the conditions of the Tuition Refund Program, the Corporation's Tuition Refund Program is applicable to courses of instruction in approved educational or training institutions directed towards qualifying an employee as an apprentice in the skilled trades. In this connection General Motors Corporation will cooperate and work with such education and training institutions in the development of courses directed toward qualifying an employee as an apprentice in the skilled trades.

Types of Courses:

Courses to be approved under the plan will include those related to maintaining and improving the employee's skill in performing his job or contributing to his general development within the corporation. The following programs are considered job related and will be approved when the needs cannot be met within the corporation:

- Courses which will improve the employee's skill on his present job. This includes courses designed to update employees in the technology of their trade or occupation.

- Courses which relate to the next job in the logical development of an employee's career.

- Courses which will prepare an employee for openings that are expected to occur in the future and for which a sufficient number of qualified employees are not available.

- Courses taken to complete the requirements for a grammar school certificate or high school diploma.

- Any literacy courses or courses in fundamental reading and mathematics. These include courses usually designed to teach sixth grade competency in reading, writing and numerical skills.

- Any required or pertinent elective courses taken in a degree-seeking program in a field related to the employee's job or appropriate to his career in General Motors Corporation.

- Courses of instruction in approved educational or training institutions directed toward qualifying an employee as an apprentice in the skilled trades.

Correspondence Courses:

The Tuition Refund Plan is intended to cover courses taken at approved local institutions, and correspondence courses are not included under its general provisions. Under exceptional circumstances, correspondence courses offered by well-recognized institutions may be approved but only if comparable instruction is not available locally.

By means of an administrative letter, the corporation agreed that courses leading to an associate degree in labor studies is included in their tuition refund program.

Expenses Covered:

The plan reimburses an employee for tuition and compulsory fees to a maximum of $750. No reimbursement is made for the cost of books, transportation, or any other expenses. Participants whose tuition is covered by benefits resulting from service in the armed forces, federal aid, or scholarship aid will be eligible for a refund only for that portion of the tuition and compulsory fees not covered by such benefits.

Administration:

> The Corporation shall be responsible for the interpretation and general administration of the Plan. An employee having a question regarding interpretation or administration may take it up with his supervisor or the designated personnel representative in his plant or operation. No such question, however, shall be subject to the umpire procedure of union agreements. Although a standard GM application form is available, local procedures may be established to cover approvals required and other details of administration.

Time Required for School Attendance and Study:

> Employees studying under the Tuition Refund Plan will be expected to complete the requirements of school attendance and homework assignments in hours outside their scheduled hours of work. It is not expected that such employees will receive special consideration in job assignments of work schedules by reason of participation in this program. However, inability to complete a course once undertaken, because of job requirements, may be considered warranting a tuition refund.

While the tuition refund program is designed as an off-the-job, part-time, unpaid program, there are instances where the company has provided two or three hours per week to an employee whose

education efforts require time off with pay. The UAW brochure on tuition refund programs phrases the idea as follows:

> Participation in the tuition refund program, is, of course, entirely voluntary. This usually means that class attendance and home work assignments are to be completed on the employee's own time. Generally speaking special shift assignments to enable an employee to attend class are not provided. However such problems as those would be resolved at the local union level.

Participation Rate:

There are some 400,000 General Motors workers eligible for tuition refund study. But only a small percentage take advantage of the opportunity and much of the potential funds are unused.

GM reports that in 1970, 18,000 employees continued their education through participation in the tuition refund plan. In 1970, employees studying under the GM plan were awarded 249 bachelor's degrees and 174 graduate degrees. Tuition refunds under the plan, together with individual graduate fellowships granted to employees by the Corporation, came to $2,900,000. It is not clear in this statement what level of employee is included nor how many were on individual fellowships.

In 1973 some 6,000 blue collar members of the UAW participated in the plan at a cost of about $700,000. Individual refunds ranged from about $60 to $285.

Problems and Perspectives:

Unfortunately, the rate of participation in this plan fits within the national average of less than 4 per cent utilization of this kind of program, despite the fact that both the corporation and the union appear to wish for greater participation.

Why aren't more UAW members taking advantage of the GM plan which is among the more broadly interpreted plans?

What are the characteristics, career aspirations, and physical location of those who participate in the program?

Would some revisions in the plan make it any more accessible or attractive to workers?

Would the following plan be of help?

1) Perhaps some administrative arrangement could be devised to provide a central staff whose task it might be to encourage participation, arrange for classes of special educational programs, and to follow-up on the participants' initial experiences. This administrative staff might be the responsibility of the union and financed and audited by the company. It could be advised by a joint committee of representatives of GM, the UAW, and professional management and labor educators. It is possible that the federal government would respond favorably to a GM-UAW request for financial assistance for this program. It might be financed unilaterally

by GM based upon a specified percentage of the funds potentially available in the tuition refund program.

2) Serious consideration might be given to the possibility of providing one hour of released time on Friday or Monday to which might be added one hour of the individual's own time to make up a two-hour educational effort each week in the plant. Whenever in-plant programs are attempted, high participation results. This plan has an added potential benefit as it might assist in reducing absenteeism on these days.

3) Special arrangements with educational institutions adjacent or relatively close to the plant might be developed. These might include direct institutional payments to relieve the individual from the initial outlay of funds; adjustments in school curricula; adjustments in the time of class schedules including daytime, evening, and weekend study opportunities; integration of in-plant courses with those of the educational institution; innovative programs calling for short periods of residence (weekends or week-long residential programs) in combination with individual home study programs conducted in the external degree format.

4) It might be useful to experiment with area educational councils consisting of representatives from such areas as basic education, high school equivalency, vocational education, adult education, community and technical colleges, a university, and a representative of GM and the UAW.

One might ask: Is tuition refund enough? Should all fees and books be included? Should transportation and dinner allowances be considered? Can education be provided on a lost-time basis? All these and other provisions are offered by management to other forms of training opportunities although usually confined to professional- or management-level personnel.

In France, for example, management representatives who are urged to participate in retraining opportunities are sometimes offered 110 per cent of their regular wage as an incentive. The Belgium agreement provides for a 5 per cent wage bonus as incentive for participation in evening courses.

Layoffs:

General Motors is among those American corporations who have recently laid off a great number of their employees. At the time of this writing some 200,000 GM workers are laid off with the date of return unclear. Most of these employees are eligible for a combination of unemployment insurance and payments from a negotiated supplementary unemployment benefit fund. Most of these workers

will be on the company's recall list and would have preference rights to re-employment according to their seniority.

While it would appear to be useful to the company, the individual, and society itself to enroll as many as possible of these workers in an education or training program, neither the company nor the union have so far geared themselves up to make this possible. The educational system doesn't seem to have given the matter any thought whatsoever!

The terms of the GM-UAW tuition refund plan seem to include payment for tuition refund to those who have "seniority during the entire period of a course of study and . . . (who are) in active service at the beginning of the course for which tuition is to be refunded." This last clause would appear to mean that tuition refunds will be made to those laid-off workers who had been in a study program at the time of layoff. But the vast majority of laid-off workers would appear to be ineligible for the education benefit at a time when they could most readily profit from it. Perhaps this matter will be discussed in subsequent negotiations. The parties might also be able to develop some cooperative action with the manpower and education departments of the federal or state governments. Layoffs may unfortunately become a more common problem in the next few years. Perhaps a part of the distress can be mitigated by a sensible coordination between periods of work and study.

General Electric - IUE Individual Development Program

Background:

The General Electric Individual Development Program was negotiated in 1969-70 at the initiative of the IUE which spoke for a coordinated bargaining group of eleven unions. The union sought to obtain educational opportunity for all workers and their families through a tuition refund program and a GE-IUE educational advancement fund. A factor which encouraged both management and the union to consider seriously a broad scheme of educational opportunity for all workers was the pressure for upgrading and career development education applied by minority groups newly entering General Electric. The final agreement provided for a tuition refund program of $400 per worker per year. Family members were not eligible. No fund was established. The program has not been changed in subsequent negotiations.

Rationale:

The rationale as stated by General Electric was more limited than that expressed by the union. The General Electric brochure on the Negotiated Individual Development Program asserted,

> In this period of rapid change when entire occupations - and businesses - can become more complicated, or more simple, or just disappear, trained people often need to upgrade their skills, or orient them to the new business needs. Still other people who have little or no training or education, must equip themselves with basic knowledge of reading, writing and mathematics and must learn skills that are needed by the businesses that seek employees.

The brochure encourages workers to apply for a "program that can be custom tailored to your needs." "If you are one of the individuals this program can help - that is, if your skills need reorienting or updating, or if you need basic education or higher level knowledge - you will find it worthwhile to study this booklet."

The union expressed its goals in the broadest terms:

> A large part of the undercurrent of unease in our nation stems from frustration of opportunity and what we in the IUE are going to do is at least start to remove that frustration among our own members by creating the opportunity to get whatever education our members want. We want to provide the opportunity for every member to send his children to college . . . to expand his understanding of the union and of his job . . . to learn more about the social and political life of our country. Every member must have a full elementary education . . . a high school diploma . . . the technical and vocational and educational opportunity to improve his skills and promotional opportunities and possibilities on the job, and we must see that everyone gets a college education limited by only one thing - if they do not want it.

Eligibility:

All full-time hourly or non-exempt salaried employees (some 188,000) who have six months or more of service with the company are eligible for this program.

Unique Features:

The program covers three broad areas of education and training:

A. 100 per cent tuition refund up to a maximum of $400 per year per worker for satisfactory completion of approved job-related or career oriented courses.

B. Training opportunities for employees on layoff: Tuition refund benefits similar to part A. A training allowance up to 50 percent of weekly pay under limited circumstances.

C. Company sponsored programs. The company will continue to offer local training programs in the plant or in conjunction with local school systems based on the needs of the business.

Types of Courses:

The following are examples:

Basic literacy . . . complete grammar school or obtain a high school diploma, specific courses designed to update you in the technology of your trade or occupation. Courses related to the next job in the logical development of your career in the company, occupational or vocational courses which will prepare you for openings that management expects to occur in the future. College level programs or courses related to your career opportunities in the company.

Expenses Covered:

The plan provides payment for 100 per cent of tuition and compulsory fees such as laboratory fees, registration, graduation, and library fees up to a maximum of $400. It does not pay for books, transportation, meals, or course materials.

Participation Rate:

Participation in this program is shockingly low. A 1971 report on its first year's activity indicates that only 600 persons enrolled under the provisions of this program at the negligible cost to the company of $150-$200,000.

Problems and Perspective:

The first problem in connection with the GE-IUE program is that it is not being used by workers. An easy but unbelievable conclusion might be that the workers are not interested. Although the rate of participation is an embarrassment for the company, it has been unable or unwilling to promote the program effectively. No serious attempt has been made by the company to find out why its manuals, public relations efforts, and its good intentions do not attract workers.

It is suggested here that the unnecessary limitation on reimbursement costs, the poor communications system within and among the General Electric plants, the lack of effective cooperation between the company and the union, the resistance of the company to seeking out government support, and the lack of any mutual plan for promoting and administering the program are among the more significant reasons for the failure of the individual development program to realize its potential.

Education and Training Funds

Labor and management, through collective bargaining, have established a significant number of education and training funds based upon a fixed sum payment by management into a fund on a specified basis. This might be a cents per hour payment, a specified annual sum per employee, or a designated sum for the length of the contract, or some other variation. Programs developed

under the aegis of these funds appear to be stimulating high levels of worker participation. One fund reports that over 50 per cent of its eligible membership have participated in programs developed through the fund's efforts. Another outstanding education and cultural trust fund has been able to include the whole of its membership in various aspects of its educational program. Still another union has been able to mount an outstanding vocational teacher training program annually which has made a significant impact on keeping its apprentice instructors abreast of new technology in the trade. Several unions which administer funds of this type have provided educational opportunities for husbands, wives, or children of their members out of the negotiated fund.

It is interesting to note that when unions began to negotiate these funds it was indicated that the Taft Hartley law seemed to prohibit such funds. On July 7, 1969 a bill was introduced by Senator Williams of New Jersey to amend section 302A of the Labor Management Relations Act of 1947 to permit employer contributions to trust funds to provide employees, their families, and dependents with scholarships for study at educational institutions, or to establish child care centers for pre-school and school age dependents of employees. The bill was signed by President Nixon in October 1969.

UAW-General Motors Training and Education Fund

The UAW brought a most interesting and far-reaching proposal for a training and education fund to the GM negotiating table in 1970 to be funded by a $\frac{1}{4}$ cent per hour worker contribution by General Motors. Although the proposal was not accepted by GM, it contained a sufficient number of innovative concepts to warrant a discussion in this paper.

In its rationale for the fund, the UAW stated:

> Neither the worker nor his child should have to regard factory work as a dead end, and working in a General Motors plant should not foreclose an employee's future or that of his children.

Emphasizing the changing composition and character of the ever more youthful General Motors working population, the UAW asserted that:

> This can only mean changed attitudes at the work place, different views of the authority of management, a yearning for greater self-reliance and an independence of spirit. The corporation some years ago took cognizance of the change in mood as compared with an earlier generation of General Motors workers and each day it discovers that the "old" way of doing things is not necessarily valid or accepted.
>
> This is equally true within the union, for, after all, the union member is a General Motors employee. We in the UAW try to meet this problem and its effect on the internal organization of the union in many ways--educational classes, adult education, extension courses, correspondence courses, classes to permit achievement of a high school diploma, summer schools, winter institutes, etc. While these efforts are valuable, we find that more and something different is required. We find moreover that the concept of worker education must now be superseded by the concept of family education.

To help meet this problem, the UAW has constructed a Family Education Center on Black Lake in Michigan. . . . at the UAW Family Education Center we plan to raise labor education to new and higher levels. We will reach out to the families of our members as they participate in the program of the center and through them build additional bridges of contact with the entire community.

The UAW proposes to make its Family Education Center "a model of the good life--lived in a free, open, healthful and beautiful environment.

The program at the center will be designed to include everyone, member and spouse . . . during the summer months when children . . . can accompany their parents . . . the children will enjoy the advantages of a well organized program in a beautiful natural setting and family activities will also be scheduled to bring parents and children together. During the period of the year when the children are in school, the worker and his spouse will participate in the educational program.

At the UAW Family Education Center, we will set an example that we hope will become a tradition, <u>matching in significance all the other gains</u> made by our union, through which the lives of UAW members have been enriched, made freer, more secure and more rewarding.

The future of the UAW--our effectiveness at the collective bargaining table--our contributions as a creative and constructive force for social change within the community--our common effort in building a better tomorrow and improving the quality of life for UAW members and their families and all people will in large measure be determined by the quality of the leadership of the UAW at every level of our union and the support and solidarity we can inspire among the UAW members.

The UAW Family Education Center is about this central and critical question: the quality of leadership . . . quality of leadership is an essential ingredient of a sound, mature and sophisticated collective bargaining relationship. Poor leadership quality can be an irremediable detriment to that relationship.

Although the UAW has not yet convinced General Motors that it should participate in the family education concept, the union has proceeded with the purchase and development of its family education center at Black Lake and is financing the innovative educational program out of its own funds.

District 37, State, County and Municipal Workers - City of New York Education and Training Trust Fund

District 37 American Federation of State, County and Municipal Workers was among the first unions in the public sector to negotiate educational benefits for its members through a training trust fund plan financed by New York City. In the initial agreement of 1969 the amount of $25 per employee covered by the contract was contributed by the city. Subsequent negotiations have increased the contribution per employee per contract term to $50, bringing the total available funds to over $1 million per year for some 60,000 eligible employees. The program has been a startling success. Additional unions who hold contracts with the city have followed the lead of District 37.

In 1969 the clause relating to the training fund stated:

> For the term of this contract, the City agrees to allocate a fund equal to $25 for each employee covered by this contract.
>
> The fund shall be used to provide additional training and education opportunities beyond those presently provided by the Department of Personnel, designed to increase the effectiveness and efficiency of employees covered by this contract, and to prepare them for advancement and upgrading.

> The City Department of Personnel will plan, administer, coordinate and evaluate all training programs initiated pursuant to this contract. The Department of Personnel shall consult, on a regular and continuing basis, with the Union on its plans for all such programs, and the Union shall participate in the selection and recruitment of employees receiving such training.

Even in the first year the program proved its viability, but the union found itself handicapped by bureaucracy and control which resided in the city Department of Personnel. The union felt the Department of Personnel did not understand the nature of this new program and called in succeeding negotiations for a freer role in planning and developing educational opportunity programs for its members.

In 1970 the clause was changed to read:

> The City's contribution to all existing and any newly negotiated Training Fund agreements may be applied, by the agreement of the parties, to a mutually-agreed upon Training Trust Fund for the purpose of establishing and administering a plan to provide opportunities for training and education for covered employees beyond those provided by the Department of Personnel.
>
> The Training Trust Fund shall plan, administer, and coordinate all training programs to be financed by the Training Fund. Such training programs shall be designed to increase the effectiveness and efficiency of employees covered by the agreement and to prepare such persons for advancement and upgrading.
>
> The Training Trust Funds and training programs shall be subject to fiscal audit by the Comptroller of the City of New York and to prior approval and performance audit by the Department of Personnel.
>
> All factual data necessary to evaluate the programs shall be furnished to the Department of Personnel by the Training Trust Fund. The Department of Personnel shall respond within 30 days stating its objections, if any, to the proposed program.

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This clause shifted to the union the positive role in developing and administering the educational programs and assigned the task of auditor and evaluator to city agencies.

Rationale:

"The City Wide Training Fund," writes the union, "established in accordance with city contracts with several locals of District 37 AFSCME, is intended to provide training opportunities that will help employees to improve their performance in their current jobs, as well as prepare them for career advancement. We are widening the horizons of our members, while at the same time preparing them for expanded career opportunities--we're doing what American labor has dreamed of doing for 140 years."

Unique Features:

1. The program is administered by the union and audited and evaluated by the city employer.
2. The program offers basic literacy, high school equivalency, vocational, and career training, and college level studies, including labor studies. Most of these programs are offered in a building owned by the union. District 37 has established an accredited "labor college" in cooperation with New Rochelle College. So close is the symbiotic relationship of the union and New Rochelle College that part of the

union building has been designated as the District 37 Downtown Campus of New Rochelle College.

Types of Courses:

For all covered titles:

High School Equivalency Program
College Refund Program
Municipal Personnel Program

For Nurse's Aides:

Licensed Practical Nurse Science Remediation Program at D.C. 37
Nurse's aide to Licensed Practical Nurse at Central School for Practical Nursing
X-Ray Technician Program at Bellevue
Medical Laboratory Technology Program at New York City Community College
Inhalation Therapy Program at Borough of Manhattan Community College
Allied Health Trainee Program at Various Community Colleges

Miscellaneous Programs:

Pre-College Remediation Program
Secretarial Program
Stenotype Program
H.D.A. Basic English Course
Model Cities - Steno. Program
Workshops:
  Food Service Workshop (for Dietary Aides)
  Housekeeping Aides Workshop
Sup. Cashier Transit
Sen. Computer Operator
Language Courses - Basic and Advanced
Ballet Classes
Arts and Crafts
Drawing
Staff Training
Stewards Classes

Participation:

In 1972 some 43,000 people took part in District 37's education activities. Some 3,800 members engaged themselves in traditional union education (about 1,900 in steward's training classes and about 2,000 in out-of-town steward's conferences). It includes about 5,000 in career training and upgrading (about 1,100 in high school equivalency; about 1,800 in training with the hospital corps; about 2,100 in civil service exam preparation courses of various kinds; and about 10,000 in a TV exam training program on income maintenance). It also includes about 8,000 people in peripheral activities (travel, ballet, retiree's activities, summer camp, art classes). This almost unbelievable participation rate was achieved by the enthusiasm and imagination of the union education staff; the urgency of the members' needs for upgrading skills and knowledge; and the loyalty, trust, and intimacy developed among students, union staff, and faculty.

The building supplied by the union for the education program is a beehive of educational activity. The existence of the training trust fund provides the union with a predictable annual income. The union has been able to develop a staff and faculty capable of planning, administering, and coordinating the kinds of educational activities most immediately relevant to its members. The union is committed to upgrading programs even though they may mean that some upgrading program graduates leave the jurisdiction

of the union--as have about 400 nurses aides who became licensed practical nurses.

This helpful attitude, the friendship and concern for their educational problems and fears, draws these many thousands of workers to a building in downtown New York, on the extreme west side, in the dark of night, when most buildings in the area are deserted. Many of these workers have schools much closer to their homes which offer courses in high school equivalency preparation for example, but still some 1,100 male and female workers come together in the union school where they feel comfortable. Few drop out before completing their programs. All who require it receive as much individual attention as needed.

In contrast to the competition emphasized in some schools, it is a common occurrence for one union student to assist his or her fellow workers to prepare for the exams.

> The union's high school equivalency program is reputed to be the strongest in New York City, with the lowest attrition rate and the highest percentage of students passing the equivalency exam. Its popularity is such that there has never been, in its four-year span, enough space to accommodate all those who apply.

This excess of applications to available spaces applies as well to other programs offered by the union and particularly to the college tuition refund program which currently enrolls 1,400 union members. The union's method of selecting candidates for tuition refund is refreshingly unique and impartial. There are no needs tests, embarrassing qualifying interviews, or other administrative

hassles. If the applications exceed available funds, the individuals are selected by lottery with a priority status for those who are temporarily denied support. The union has also made adjustments in the amount of tuition refund offered in a particular year based upon the desire to reach the greatest number with a reasonably decent refund program. From the fall of 1969 through fall 1973 the union spent some $239,613.30 in college tuition refunds.

District 37 AFSCME has used its stability of income and the flexibility and attractiveness of its programs so effectively that it has been able to continually broaden and expand its educational perspective and offerings. Perhaps the outstanding innovation so far has been the establishment of the District Council 37 Campus of the College of New Rochelle at the union's headquarters on the west side of New York City. This integration of the union and an academic institution was developed under the pressure of union members for academic study beyond the high school equivalency program and by the desire of the general membership for college degree work. After considerable effort and exploration, District 37 and New Rochelle College agreed on a symbiotic relationship that has proven helpful to both parties. As part of its curriculum offerings, New Rochelle and the union developed a major in labor leadership training. This degree program is conducted with the added support of Cornell University's New York State School of Industrial and Labor Relations. The District 37 people believe that they have initiated the first accredited labor college sponsored by a single union. The

college started up in 1972 with 153 students, 20 enrolled in the labor curriculum and 130 in the regular liberal arts program. After half the students pay their own tuition and half get full reimbursement from the union.

The college director "in the un-ivied halls of DC 37" expressed his goals as "We wanted to redefine the BA in terms that would make sense to adults." Apparently he has done so successfully. District 37 intends to broaden and strengthen its negotiated training trust fund until "all of its members receive the opportunity to educate themselves to their fullest capacity for career advancement and union and citizenship leadership and for personal development."

Local 3 IBEW-New York Electrical Contractors
Industry Education and Cultural Trust Fund

Local 3 IBEW is a driving force in the development of greater educational opportunities for workers and their families. With a membership of highly-skilled, relatively well-paid workers, the local attained a central role in New York City's construction industry and in its labor and political affairs. Local 3 IBEW has pioneered in trade union education, adult worker liberal arts education, political education, and education-thru-travel programs. It is internationally known for its successful Bayberry Land year-round residential education program and for its support to the development and administration of the New York City Labor College associated with Empire State College.

Local 3 IBEW is undoubtedly unique in character, but it is neither isolated nor working in a vacuum, as can be seen in the description of other union experiments in this paper. Local 3 describes the Joint Industry Board of the Electrical Industry which was established in New York in 1943 as the method used to "administer all of the plans and benefits agreed to by local Union No. 3 IBEW and employer negotiators providing the greatest benefit coverage of its kind in the history of the labor movement."

Management's view of the situation as expressed by Armand D'Angelo, president of the joint board, seems equally strong. "The electrical industry in the New York City area is widely considered the most completely integrated industry in America, in the sense that its management and labor are not only committed to identical goals but are organized to work toward the achievement of these goals on a day-to-day year-round basis."

Thus the Joint Industry Board administers its own workmen's compensation plan; a realty corporation which builds housing, supermarkets, etc., and a pension plan with vesting and portability rights. It provides surgery, dental, optical, and disability plans. There are rest home benefits, low-cost housing benefits, annuity funds, jury duty benefits, a children's camp, etc. There are scholarship benefits, grants, tuition refunds, apprentice training plans, and an educational and cultural trust fund. The education and cultural trust fund is financed by a 1 per cent of payroll contribution by

employers. The fund sponsors a staggering variety of educational programs and supports innovation and experiments with different methods of bringing the fruits of education to Local 3 members. A 1971 contract illustrates the agreements worked out between Local 3 and industry representatives.

> Effective July 1, 1971 all Employers shall remit weekly an amount equal to one (1%) percent of their gross weekly production payroll covering all employees under this agreement to the Educational and Cultural Trust Fund established for educational, cultural, charitable and philanthropical purposes.

Another clause in the same contract provides:

> The Educational and Cultural Trust Fund will grant Journeymen electricians and other participants qualified and acceptable to attend the School of Labor, Management and Educational courses conducted at Bayberry Land, effective July 1, 1971, a sum up to $240.00 for a one (1) week course of study at the conclusion of their studies. Graduates of the course at Bayberry Land who have completed a post graduate course at an accredited college selected by the Joint Board may have the opportunity for additional studies in foreign lands. Two men will be selected each year by competitive examination conducted by the proper authorities, to visit foreign countries.

The amounts paid workers to provide reimbursements for salary loss vary in subsequent contracts and the education-through-travel program has been expanded so that groups of union members have been able to travel in the Caribbean and in Europe. A very successful seminar was held in 1974 in cooperation with the New York State School of Industrial and Labor Relations and the ILO in Geneva. Still another educational provision in the 1971 contract which was developed to encourage workers to participate in political education

and to be aware of their responsibilities as citizens was a clause providing:

> The Educational and Cultural Trust Fund will grant a supplemental payment of $45.00 to each Class A Journeyman for each day a class A Journeyman serves as a juror, provided, however, that such Class A Journeyman, at the time of his jury service was an active participant in the industry and completed a prescribed course in "Citizenship Responsibility. Other employees covered by this agreement shall receive payment in a proportionate amount based on wages as determined by the Joint Board."

This provision came about as a result of a "register to vote" campaign of the local. Members pointed out that they did not register to vote because juries were selected from the registration lists and because jury duty cost them too much of their income. Thus, the joint board established an educational prerequisite for additional jury service wage reimbursement. As a result, most journeymen did register to vote, completed the ten-week citizenship course and, when called to jury service, benefitted from the provision. Some $116,559 has been expended by the union in connection with this benefit.

The late Harry J. Carmen, former Dean Emeritus of Columbia University, who served as consultant and advisor to Local 3, described the purposes of its program as follows:

> Today when the individual is called upon to make innumerable adjustments to changing conditions, a broad educational background is indispensable. Increasingly, every individual today realizes that without education he is severely handicapped not only occupationally, but in other ways as well.

> In any rapidly changing civilization such as ours an informed and responsible citizenry is absolutely essential. We want citizens with a broad perspective, a critical and constructive approach to life, with standards of value by which they can live nobly. We want them to have a deep sense of responsibility for their fellows and to be persons of integrity easily motivated to action in the cause of freedom and good will. We want them to make intelligent and wise judgments, to be able to work effectively to good ends with others. Whether they be leaders or followers we want them to be concerned about values in terms of integrity of character, motives, attitudes and behavior. We want them to be useful in that they are not above doing humble things, discovering and using for themselves and society the special gifts with which they may be endowed. We want citizens who are ambitious to make good to achieve in ways which are forthright and above board.

Perhaps the most outstanding trade union attempts to help develop this kind of thinking worker is the union's Bayberry Land Program.

> "Critical Thinking in Human Relations" is an education course conducted at Bayberry Land in Southampton, New York, under the sponsorship of the Educational and Cultural Fund. The year 1973 was the seventeenth successful year this course has been conducted. Since its inception over 14,000 students have been paid over two and a half million dollars in education expense benefits. This past fiscal year, 576 students attended and were paid benefits of $121,839.00.
>
> Qualified participants spend a week in the beautiful surroundings of the 314 acre Bayberry Land estate; students live, eat and attend classes and study in the English Manor House. They attend the course without the loss of income to themselves. The primary objective of the one week resident program is to provide the participants with the opportunity to examine some of the basic attitudes, knowledge and skills necessary for the independent and successful handling of complex personal, family, work and social lives and to become more effective individuals, family members, union members, members of the electrical industry and citizens.

This past year a new twenty page booklet was published describing the course, its location, purpose, plan and schedule. It was distributed to all participants and also publicly.

Since 1948 the Local 3 Scholarship program which provides annual awards to the sons and daughters of members of Local 3 has awarded some 623 scholarships, having a value of $3,443,400. In 1973, scholarships totalled $293,709. Bayberry Land's 1973 expenditures from the fund were $393,966, including administration costs as well as worker-student stipends. The local provided $51,000 in grants, $116,559 in jury duty benefits, and $263,007 for other cultural activities such as providing tickets for Man of La Mancha, HMS Pinafore, Nutcracker Suite, Pepe the Clown, Marcel Marceau, Madame Butterfly, and Tosca.

Since 1964 the College Reimbursement Program has aided participants and their spouses who wish to complete their college education or go on for higher education.

A motion was made, seconded and unanimously carried that the Fund pay the annual college tuition of eligible employees and the spouses of eligible employees upon the following conditions.

1. In order for an employee or an employee's spouse to be eligible for the payment of annual college tuition:

   (a) the employee must have been employed or available for employment, for a period of at least five (5) years, immediately prior to the date of application, by an employer or employers who contribute to the Joint Industry Board of the Electrical Industry; and

   (b) the employee or the employee's spouse must be a high school graduate; and

   (c) the employee or the employee's spouse must have matriculated at an accredited college or university;

2. The amount paid to the employee shall consist of the annual tuition paid to the college, plus the sum of ONE HUNDRED ($100) DOLLARS per annum, for expenses;

3. The Board of Trustees or a sub-committee thereof shall have the sole right to determine to which applicants the award of annual college tuition shall be made.

During the school year 1972-73, 172 participants or their spouses accumulated 2,201 college credits and were reimbursed $111,300. Since the inception of this program, $494,135.95 has been paid to help people gain college credits.

The Industry Education and Cultural Trust Fund balance as of September 30, 1973 was $10,798,165 with an employer contribution of $2,152,537, an investment income of $179,200, and an expenditure of $1,821,223 for the 1972-73 fiscal year.

The Joint Industry Board also offers a five-year apprentice training program which consists of more than 140 hours of school per year in addition to on-the-job training. In 1962 the joint board apprentice program took the lead and made "a significant break-through in job opportunities in skilled employment for minority group workers." Thousands of other Local 3 members have participated in vocational training courses offered by the union's electronic wiring school. Over a thousand members learned exhibition and switchboard wiring.

> Electrical Manufacturing Division members who never before handled a soldering iron or hand tools and who were never able to read a simple wiring diagram are now acquiring these skills at special industrial retraining classes at the union headquarters.

The local offers a wide range of liberal arts courses, including high school equivalency programs, consumer guidance courses, world affairs classes, educational tours of the United Nations, conferences on "the full employment economy," and courses in citizenship education.

Labor education in the traditional bread and butter courses for trade unionists is built into the structure of the Local 3's educational activities. Courses in grievance procedure, shop steward training, labor history, labor law, labor book discussions, and courses in labor economics are offered by the union. Over the years, members of Local 3 have taken labor courses at Cooper Union, Cornell University School of Labor Relations, the New School for Social Research, and other well-known schools.

The education-through-travel program of Local 3 since 1950 has placed officers and business representatives "in every country and continent of the free world."

Perhaps the most significant innovation designed to meet not only the needs of Local 3 and of New York labor generally but those of all New York City residents is the founding of the New York City Labor College, spearheaded by Local 3, which also helped to arrange the labor studies program through Empire State College-Cornell cooperation.

Local 3 is fond of quoting great thinkers on the value of education in society. Perhaps John Dewey best expresses the fullness

of the ambition of Local 3 leaders when he wrote "It is in education more than anywhere else that we have sincerely striven to carry into execution the Great American Dream: the vision of a longer and fuller life for the ordinary man, a life of widened freedom, of equal opportunity for each to make of himself all that he is capable of becoming."

Local 1199 RWDSU-Hospital League Training and Upgrading Fund

Local 1199, Drug and Hospital Union RWDSU/AFL-CIO, established the Hospital League/Local 1199 Training and Upgrading Fund in 1969 as a result of collective bargaining between the League of Voluntary Hospitals and Homes and Local 1199. It has since been expanded to include additional hospitals and homes outside the league. At the end of 1972, a total of eighty hospitals and nursing homes employing approximately 40,000 members of 1199 were contributing to the fund. The employer's contribution was based upon 1 per cent of their payroll.

> The Fund was established . . . to train and upgrade members of the union working in hospitals and homes to higher skills and better paying jobs. . . . (it) is designed to assist members of the union who desire to advance themselves. It offers members working in the health care field the opportunity to build on a foundation of skills and experience already acquired. In some circles this is called the "career ladder" concept. A worker is encouraged to reach for the next rung. Experience should be an upward moving thing.
>
> It is socially and economically valuable - and completely feasible - to encourage the talents of workers who

> demonstrate a capacity for advancement. This program is dedicated to the idea that promotion from within the hospitals and homes should have precedence over outside recruitment.
>
> One of the key features of the Training and Upgrading program is that it is prepared to provide the missing tools for advancement. A worker in a hospital may have a lot of on-the-job experience but lack the required high school education. A Spanish speaking employee may have difficulty in reading and writing English. The fund is prepared to provide basic help in overcoming these obstacles before actual instruction starts in advanced training. . . . This is a program to knock down traditional barriers - not create new ones.

Thus the union has developed a variety of remedial programs and called upon educational agencies to assist in certain basic education needed by members of the union. These courses are considered preliminary to the advanced specializations and are offered primarily as part-time or after work courses. They are scheduled so that all work shifts can participate and are offered from 9 a.m. to 1 p.m. and from 5 p.m. to 8 p.m.

The advanced classes are full-time courses. Worker-students are granted paid educational leave to participate in courses leading to such certification as licensed practical nurse, registered nurse, and X-ray technician, in a vast array of health-related programs.

> Students in full-time study programs sponsored by the Fund are released from their hospital jobs and receive a training stipend of 85 percent of their net salary from the fund. Students continue to receive a training stipend of 85 percent of their net salary from the fund. Students continue to receive all union health benefits, vacations and holidays and continue to accumulate service credit under the Local 1199 Hospital Pension Fund. Taxes are not removed from the stipends since the bulk of the money is tax free.

The released-time, paid-leave programs vary in length. The practical nursing program, for example, is a one-year program. The registered nurse program calls for a two or two and a half years of study. The X-ray technology program takes approximately three years.

Thus, the 1199 program seems to afford a job and career related paid educational leave program, financed by management contributions--a real pioneer program in the United States. The fund pays full tuition in addition to the 80 per cent of net pay stipend, and also pays for related expenses such as books, uniforms, pre-testing, and tutoring. The training and education programs are clearly related to job specifications in the health industry and are accompanied in each case by a statement of the starting salary and range that can be expected by a student who satisfactorily completes his or her study program.

In its description of the student's responsibilities in connection with the paid educational leave, the union emphasizes that students will be expected to perform conscientiously up to expected standards and will be expected to give his or her original employer first call on the acquired skills. It reassures the student that "the hospital on its part is required to give its next available opening to the newly-trained employee."

Local 1199 appears to have negotiated a career ladder program for its members in the health industry which is job advancement

oriented but requires considerable liberal arts study in the advanced courses. Paid leaves extend for the required length of the course of study many of which require one, two, three, and four years of full-time study. Local 1199 asserts the fund will assist qualified members of 1199 who wish to be trained in every and all health fields--including those who wish to become doctors, psychiatrists, dentists, pharmacists, or research workers.

> We see this as an ever-growing program that will be expanded in response to members' requests for training and in proportion to the job opportunities open to trainees.

Family Education

Kimberly Clark Corporation

One of the more innovative, unilaterally developed, corporate plans, which blends the features of educational leave, tuition refund, and entitlement to education for family members, is that established by Kimberly Clark Corporation in July 1974.

> Tuition Refund - Family Education Account - Paid Leave Entitlement:
>
> Each individual is provided with an annual personal "bank account" to spend for approved job related and non-job related educational activities (including course fee, room and board, travel and required texts). In addition, a family education account is established at a rate approximately one-half of the individual's annual allotment. This fund is designed to accumulate over the years and is available for any educational program desired by members of the employee's family. A third feature of this plan entitles a limited number of employees who have demonstrated a high level of performance to be granted - no strings attached - extended leaves, with pay and at

company expense, for the purpose of pursuing "special educational programs" which clearly relate to corporate objectives.

From all appearances in the first six months of operation, this program will achieve a high level of participation among eligible employees. The company believes that the fact that the employee actually has ownership of the money will stimulate thought and planning for spending it. The company also stresses that it is the family who decides how much will be spent and upon whom and for what! This, the plans promoters feel certain, will also tend to produce high rates of participation.

Multinational Corporations

Despite the fact that some American corporations have hesitated to accept the responsibility for, or refused to consider providing educational opportunities for, the families of American workers, they have in their role as multinational corporations accepted educational opportunity obligations for family members of their employees in foreign lands. The extent and variety of these educational opportunity clauses vary country by country, and few companies provide identical programs in all countries.

There are good and sufficient reasons for American companies to provide educational benefits in their overseas operations. In some countries, workers require special motivation and specific job skills. The workers have a strong desire to see their children

educated so that companies have agreed to provide tuition grants to children of their employees, help purchase books, supplies and, on occasion, shoes and other necessary items required for school attendance.

These grants cover primary and secondary school and university attendance. General Motors asserts that its tuition refund is available to South African workers. In Chile, GM offers five man days per year of paid educational leave. Chrysler, in Columbia, provides a modest amount of paid educational leave. General Motors in Mexico provides scholarships for workers' children for technical, industrial, or practical study. A few of these scholarships are available to employees. In one plant, GM provides full wages for two workers to engage themselves in technical studies. General Electric Corporation in Caracas provides a sum of money for scholarships for children and school supplies. In Mexico, GE provides a fund to finance studies of workers in fields useful in work at the company. Twenty per cent of this fund may be used to finance semi-professional or professional studies for workers' children. Westinghouse in Chile provides education grants in specified amounts for primary, intermediate, and advanced schooling for workers' children. RCA in Chile makes similar funds available which are distributed by the union in terms of priority need.

Fellowships and Scholarship Programs

Scholarship programs are additional examples of educational opportunities offered by many American corporations and unions in the United States. Some companies expect to improve the morale of their employees by helping their children go to college. Unions most often provide scholarships for the children of their members.

Fellowship programs are often designed to recruit new technical personnel but companies who provide fellowships are gambling that the beneficiaries will return after completing a study program. In one instance a company sponsored ninety-six individuals and only six returned to the company. Investigation revealed that the company had also recruited forty-six other fellowship holders from other companies. Thus the educational efforts conceived in broad terms benefitted the industry as well as the individual companies.

Comprehensive Educational Opportunity Programs

Let us conclude our discussion of collective bargaining and education by outlining two examples of corporate attempts to develop well-rounded educational opportunity programs for their employees. It is not clear whether or not the whole of the corporate program is subject to negotiation but in each case the union's responsibilities are clearly recognized. These efforts are significant because they are indications of advanced thinking about how to provide full educational opportunity programs in a cooperative union-management relationship.

In England, the government is intimately related to the corporate union plan through the Industrial Training Board. In the U.S., for example, the government is so far not related but might be able, should it be invited, to contribute a good deal to the mutual benefit of all concerned.

Ford in England

In England, Ford of Britain was levied approximately £3.18m by the Engineering Industry Training Board, most of which was recovered in grants. "The company has been 'in profit' over the years" and in accordance with the 1973 Industrial Training Act revisions, "is now presenting a case for exemption" from the levy.

The Ford of Britain program includes:

Established Schemes

> These are training courses which have fairly continuous content and are designed for sectors of the employee population with a distinct identity. Often they are set up to bring new recruits or freshly promoted personnel to an acceptable performance standard within the shortest space of time. Among these are the Graduate Recruitment programme, . . . Plants have individual programmes for newly appointed foremen. These are a blend of on-job and lecture room training lasting for about four months; a tutor general foreman plays as important a role as the training officer, thus exemplifying the principle that line management should be involved in improving employee performance. The same principal is invoked in recently created guide lines for newly hired salaried staff. With the aid of training officers, management is expected to define the standard to be reached by new hirings at the end of a month's induction, and to nominate an experienced person to act as on-job coach, whilst training or personnel officers take charge off-job of general Company orientation.

The longest established schemes of all are for craft and technician apprentices. . . . Training centres are established in Essex, Halewood (Liverpool) and Swansea.

At the technological level school leavers may be sponsored for a sandwich (co-operative) course leading to a degree (Brochure attached).

Sandwich course undergraduates in other vocational disciplines are offered practical training with the possibility of sponsorship to follow (see Brochure).

Shop stewards (trade union representatives elected by and from among the workforce) are given day release to attend technical colleges. The programme, which is agreed with the TUC, covers essential knowledge areas such as law and skills such as negotiation.

The most common form of training given to management is the Kepner Tregoe course in problem analysis and decision making. Otherwise training is on-job and the manager's needs are partly identified from his existing knowledge and skills, and partly from task analysis of his job.

Occasional Programmes

As the name implies, these are given as occasion demands to meet needs which rarely if ever recur. One example was the introduction of the metric system in Ford engineering; this came well in advance of any national move and the material had to be created internally and widely disseminated. In another case a week-end seminar on OD for top Industrial Relations managers was mounted. Identification of and provision for occasional needs is a continuous feature of training at plant level. Two recent examples reflected between them the changing geographical strategy of the Company and the changing composition of the workforce. One was a Spanish language course for managers and technologists. The other was an English language course for Asian immigrants.

At times there is the possibility for operatives to be advanced to a higher hourly paid grade. Local training initiative plus the use of the central technical training resource is typical.

Organisational Note

Each major plant has a Training Manager accountable to the Industrial Relations Manager and supported by instructing staff. In major areas Training Managers may also be assisted by Training Representatives, whose role is to assist management with problem analysis and ensure that training needs which may arise are closely identified and the objectives duly accepted by line management before training services are called upon to design and implement a programme.

Policy making and planning are the responsibility of central staff.

In all, the Company would expect to devote some 380,000 days - averaging 6 days per employee - each year to training, including all forms of planned learning experience in the word.

One of the more thoroughgoing approaches to a joint company-union educational effort in the United States is contained in a letter of understanding between the Chrysler Corporation and the UAW in connection with their 1967 collective bargaining agreement.

In the negotiations leading to the new collective bargaining agreement that Chrysler Corporation and the UAW signed today, it was evident that both the Corporation and the Union are vitally interested in developing the skills, talents and potentiality for advancement of employees in their own and other UAW bargaining units, and in enabling them to keep pace with rapidly changing technology, methods and processes in our plants and offices. It was equally evident that both the Corporation and the Union are urgently interested in recruiting and training employees to take the places of those who qualify for higher rated and more responsible positions, and to make themselves eligible later for similar positions.

This is not by any means, a new development. Chrysler has introduced a number of new training programs for its employees and has expanded others to help employees take full advantage of their capabilities.

In addition, the Tuition Refund Program that Chrysler instituted in October, 1964, for which all Chrysler employees are eligible, has provided them with the opportunity to obtain job-related instruction in education and training institutions, and many have taken advantage of it. The success of the Apprenticeship Training Program under an agreement between Chrysler and the Union has been outstanding.

Recognizing the continuing and expanding need for employee training to enable Chrysler to continue to improve its competitive position and to assist then current employees to take advantage of promotional opportunities in the future, the parties will establish by January 1, 1968, a National Training Committee, consisting of five representatives of the International Union and five representatives of the Corporation to be appointed respectively by the Director of the National Chrysler Department, of the International Union and the Vice President-Personnel of the Corporation. The members of this Committee shall include at least one person who is familiar with the training needs and related problems of employees in each of the following areas: (i) office and clerical employees, (ii) engineering employees, (iii) skilled trades employees, including upgraders, but excluding apprentices covered by the Supplemental Agreement relating to apprentices, and (iv) all production and maintenance employees.

The National Training Committee shall have responsibility for investigating, developing and recommending, on a uniform basis, for all plants and offices:

(1) New and/or expanded training programs that will be in the best interest of both the employees and the Corporation;

(2) Standards for the implementation of the various training programs the Corporation has instituted or may institute, and particularly for encouraging qualified employees to participate therein.

(3) Methods and techniques for selecting candidates for training on the basis of aptitude, interest and other qualifications; and

(4) The instructional methods to be used in such training programs.

Each Local Union shall (i) encourage its members to enroll and to continue to participate in training programs; (ii) counsel and advise them on the availability of training programs and as to the appropriateness for them of the various programs, having in mind their experience, aptitudes, education and other qualifications; (iii) advise the National Training Committee as to the needs among its members for training programs.

The National Training Committee will submit whatever recommendations it may make to the Corporation and the International Union, but may not commit either party to a training program or any aspect thereof.

While it must be said, in all honesty, that this approach is still these six years later more a statement of intent than a practical functioning program, it seems to offer concerned governmental education and training agencies a solid basis for providing whatever assistance might be necessary to help the parties implement their good intentions.

Before leaving this section it is necessary, once again, to refer to its limitations.

There are other significant programs provided by American management which call for recognition and evaluation. A few of these include those of Bell Labs, DuPont, IBM, AT&T, RCA, the airlines, and many others not mentioned.

There has been no discussion of the government's role in funding special manpower efforts of corporations and unions through on-the-job training and educational advancement programs such as

the A. Phillip Randolph Recruitment and Training Program and the Urban League Labor Education Advancement Program.

Nothing has been said about the work done by the plumbers union based upon an $.11 per hour contribution to employers which provides an outstanding apprenticeship and skill upgrading program for its members.

Nor have we discussed the funds and their activities negotiated or granted by government to the laborers, the carpenters, the maritime workers, the longshoremen, the Service Employees International Union, some Teamster locals, the Amalgamated Clothing Workers, and the International Ladies Garment Workers Union. No doubt we have failed to mention many others who are engaged in education, training, and scholarship activities.

There has been no comment upon the work of the forty some universities engaged in labor education in the United States or about the tendency of community and state colleges to develop programs in the field.

We have not been able to mention the efforts of Canadian and Mexican unions, corporations, and governments to provide educational opportunity programs for workers and their families through collective bargaining and legislation. In the case of Canada, many of the corporations are multi-national and are under agreements concluded by the same union which represents American workers. Suffice it to say here, that Canadian unions have

negotiated educational leave, tuition refund, and scholarship aid including scholarships to union leaders to attend the Labor College of Canada. One example indicates that Canada has begun to follow the path of negotiated training and trust funds.

> The Company shall pay $1.00 per week for each employee covered by this contract to the Educational Training and Retraining Trust Fund of local 210, for the purpose of providing education and training for apprentices and retraining for journeymen.
>
> The Trust fund shall be controlled and administered by a Board of Trustees which shall consist of an equal number of Employer Trustees and Union Trustees.

This paper has presented enough facts to point the way to a more thorough study of educational opportunity programs as they exist in collective bargaining relationships or in unilateral efforts by American corporations or unions.

The above brief survey of existing educational opportunity programs for workers and their families contains all the elements of what might some day become a national program of integrated education and training. The very mass and variety of programs, the tremendous involvement of management, labor, and educational opportunity programs, and the pressing needs of workers for help in adjusting to the coming period of economic crisis all make imperative a national discussion of the extant issues, concepts, and practices contained in the efforts to provide educational opportunity for workers and their families.

More substantive evaluation of available programs is necessary immediately and should be used in any national dialogue.

IV. RECOMMENDATIONS

The following recommendations appear to be warranted by the American and international experience in the effort to provide a full measure of educational opportunity for workers and their families through such devices as paid educational leave, recurrent education, and continuing education.

If there is anything that can be gleaned from the experiences of France, Germany, England, Scandinavia, it is the need for some national body, integrated with state and local bodies, to serve as prime discussant and mover of the idea of paid educational leave and its complementary education and work programs.

Second, it appears that, in most cases, a significant element in the successful adoption of national or regional legislation is the previous agreement of labor and management. Even in Sweden, where three years of negotiations failed to bring agreement, all of the areas of agreement and the differences between the parties had been pretty well laid out before the unions, but the political party went for a law without the full support of management. It appears too, in this case, that management would have preferred another round of discussion, hoping for agreement before a law was passed.

Third, it appears that in the above countries the formal educational system was not substantively represented in the discussions. While ministries of education were consulted and adult

education (WEA) groups sometimes contributed, the driving force was in the hands of the labor unions, management, and the political parties.

Thus the relationships among labor, management, government and professional education are an important focus of the recommendations in this paper.

1. There should be established a commission, committee, council or task force--by legislation, administrative action, or grant--to pursue the subject of educational opportunity programs for workers and their families in the United States. The group would be charged broadly with relating the worlds of work and education with special, but not exclusive, emphasis upon paid educational leave, recurrent education, and continuing education and training.
2. This group should be composed of equal numbers of representatives from management, labor, education, government, and the public whose task it would be to discuss, organize research, and supervise experimentation with delivery systems capable of integrating currently available American resources. This group could propose and test forms of restructuring education and work relationships to enhance the effective participation rate of workers and their

families in educational activity at all levels of learning as appropriate to the individuals involved, the industrial situation, and the national interest.

3. This group should concern itself with the establishment of an ordered set of relationships among management, labor, educators, government, and the public in the regions, states, and localities so that a national dialogue can take place on American education and training policy, practice, and funding.
4. The group might be responsible for initiating and administering educational and information program designed to increase their basic knowledge and understanding of educational issues and at the same time enhance the knowledge and understanding of professional educators with regard to the experiences of the world at work.
5. The group should particularly encourage regular meetings between management and labor representatives to initiate, plan, and administer educational opportunity programs in an atmosphere of mutual concern and interest. The role of government and professional education might be to observe, advise, or participate at the request of the principal parties in negotiation.

The group should attempt to establish close and ..sting links between the worlds of higher education, vocational education, and industry and labor education, and training programs.

7. It might also assess the many educational plans extant in the United States with a view toward the evaluation of these programs in terms of the objectives of the specific enterprise, the needs of the nation, and the interests of the individual worker.
8. This, or an additional body, should be organized so that Americans can participate more substantively in the international discussion on increasing educational opportunity for workers and their families.
9. Research and financial assistance should be provided by public authority in the areas of educational counseling, program design and administration, teacher training, training facilities, subsistence, tuition, travel, and other necessary personal and family allowances required to mount broad-gauge efforts to enhance educational opportunities.

Research and Experimentation

The following recommendations can be subsumed under the responsibilities of a national education and training council or they can be launched as separate but related activities. Inter-agency cooperation or unilateral support can be provided to specific projects to help develop the data to interest management, labor, and government at the highest levels.

It is well-known that some researchers have, in the past, exhibited a callous indifference to the individual or group of subjects being researched. Workers have often been the objects of research but not too often have they been the beneficiaries. Rarely, too, has the ongoing life of trade unions been researched in a fashion that will assist unions to adopt or reject policies and practices.

It should not be necessary to argue here that no one can guide the conclusions of research efforts--but the choice of areas and the establishment of research priorities has for a long time resulted in the neglect of substantive research efforts about the educational needs of workers, about why they do or do not participate in educational opportunity programs, and about their educational aspirations.

How many otherwise literate and educated professionals know anything at all about labor education or about union-management coordinated efforts to meet training and education needs of their members and employees?

It is suggested here that a higher priority in the future be given to research about labor education efforts, the education needs and concerns of workers, the efforts of labor and management to develop some measure of educational opportunity for their members and employees, and the reasons why some educational institutions have been very well able to relate to labor and management while so many others have not been able to develop forms of collaboration.

Labor Education

1. A survey and evaluation of labor education in the United States. This would include all the work done by trade unions themselves and that which they do in cooperation with management, universities, community colleges, technical schools, and other agencies and institutions. It would include trade union education, vocational training, upgrading and career education, and general, ad hoc, and degree awarding education which is conducted in whole or in part by trade unions.
2. A survey and evaluation of the efforts of trade unions to win educational benefits for their members through the process of collective bargaining. These would include such areas as: educational leave; apprentice

training; on-the-job training; upgrading education, tuition refund programs; industry-union training and education funds; scholarship programs; orientation; health and safety; minority groups; women; decision making on the job; and humanizing the work place. In addition studies should be made of innovative programs such as the operating engineers' dual enrollment program which is designed to provide skilled tradesmen with apprentice training and college-level certification toward a second career by granting a journeyman card and an associate degree in mechanical or electrical engineering, and the efforts of the AFL-CIO Labor Studies Center to provide worker union leaders with a Bachelor of Arts degree through external study programs conducted in cooperation with the University Without Walls.

3. A comparative review and evaluation of labor education in OECD countries as these programs relate to the United States. Special interest in this connection would be the methods of integrating residential and nonresidential training; the mix of trade union and general adult education; the processes of formulating national trade union policies on education

and the collective bargaining goals and practices with regard to educational opportunity programs.

Management Education Opportunity Programs

1. A review and evaluation of currently available educational opportunity provided by American management unilaterally, or in cooperation with labor unions, educational institutions, government, or private agencies.
2. A survey of management's orientation and perspective for the future in efforts they would like to make toward relating the work place to education more effectively.
3. A survey of management's current practices in connection with educational leave, paid or unpaid, including some data collection on who participates or does not participate in such programs and who benefits in what ways.
4. A survey of educational opportunity programs of American corporations in foreign lands.
5. A survey of educational opportunity programs offered by foreign management in OECD countries.

Professional Education

1. A review and evaluation of the response, by community colleges, technical institutes, universities, and state and national education departments and agencies, to industry and union based educational opportunity programs.
2. Experimentation with a variety of methods which might relate various levels of the school system to management and labor without infringing upon academic freedom and without making management and labor feel as intruders.
3. Experiment with attempts to introduce professional educators and educational institutions as authorized observers, or if invited, as counselors to the joint efforts of management and labor designed to increase participation in educational opportunity programs.

Government

1. A review and evaluation of government efforts in the education and training field with special emphasis upon the problem of integrating the work of different agencies and different levels of government responsibility.
2. The establishment of a long-range funding effort to obtain research and to experiments with new forms

of delivery systems for educational opportunity programs.

3. To provide assistance for evaluation and experimentation with ways to expand and deepen educational opportunity programs and to increase the rate of participation in them.

Unemployment, Tenuous Employment, and Underemployment

The international discussion consistently, in all countries, overlapped the specific piece of legislation or any specific item on the collective bargaining table. A whole host of educational plans and problems such as paid educational leave, recurrent education, vocational education, continuing education, unemployment, migrant workers, women workers, foreign workers, older workers, young workers, etc., and the social implications of attempting to meet the needs of the individual, the enterprise, and the society at large, continue to remain on the agenda despite agreement on any particular law or set of collective bargaining negotiations.

Many countries are passing laws and consummating private agreements providing retraining programs during periods of unemployment, offering underemployed or dissatisfied workers educational opportunities designed to establish them in another job or career. While it is correct to say that the most significant impact so far has been in vocational and career, enterprise-oriented

educational effort, it should also be noted that the working parties are continuing their dialogues with respect to developing national policies designed to integrate their efforts into an effective national system of education and training.

Thus a body such as a national education and training council in the United States might concern itself with the education of the vast number of American workers who are unemployed, tenuously employed, and underemployed. For despite the high unemployment rate, there are many unfilled jobs in America even now and hopefully the unemployment crisis won't be with us forever.

1. First of all, it might evaluate the roles of management, labor, government, and professional education as these institutions currently relate--or do not relate--to workers in these categories.
2. It might establish educational assessment and counseling programs at the job source, the union hall, or at the unemployment office, so that workers laid off temporarily or permanently might be assisted in making a personal assessment of their education and training needs and desires.
3. The group should support experimentation designed to assist state agencies, educational institutions, and management and labor organizations to take actions

which would lead an individual to a new and better job in the short run and a potential career pattern to be pursued through education and training on the job. This might be done by part-time study on a paid or voluntary basis, and through educational leave programs developed with recurring work and education experiences.

4. University and community college labor studies and industrial relations programs and schools of business are resources well-suited to help make an effort of this kind.

Special Interest Group Education, Training, and Career Development

The national policy group might relate itself in terms of educational evaluation, planning, and experimentation to those groups charged with the advancement of special interests such as minority group education and training, programs for women, foreign workers, depressed areas, etc. The central task would be to consider forms of integration of these efforts into the ongoing public and private educational opportunity programs which exist or might be developed in a particular locality.

Public Financing of Private and Public Educational Opportunity Programs

1. Public funds should assist unions and management to develop their educational opportunity programs. In particular, public funds should be invested in an effort to tap into the really huge funds underutilized but currently available in tuition refund programs.
2. Public funds should provide training and educational opportunities for those not lucky enough to be represented in collective bargaining or eligible for the unilateral corporate programs.
3. Public funds should provide training and educational facilities and/or partial support to public and private training and educational enterprises such as corporate training centers; union family education centers; university, community, and state college labor-management programs.

V. STRATEGIES FOR THE IMPLEMENTATION OF THE PROPOSED PLANS FOR PAID EDUCATIONAL LEAVE, RECURRENT AND CONTINUING EDUCATION

Coalition Between the World of Education and Work

Central to the development of strategies for the implementation of paid educational leave, recurrent education, and other educational opportunity programs for workers and their families, is the forging of a coalition among the world of education and the two powerful giants of the world of work. All European experience points up the driving forces of labor and management and the significant role they must play in any effort to implement work-related educational opportunity programs. Surely American experience emphasizes this fact. Can one conceive of any of these programs without the intimate involvement of management and labor and government in its twofold role as public sector employer and as the political expression of social and economic power in society?

Yet the American and European educational systems have so far been unable to relate themselves effectively to the educational needs of industry, labor unions, and the adult worker. We are informed by our colleagues in the OECD-CERI report on paid educational leave that:

> The impetus for the program came from forces outside the government, for example, from the trade unions (as in Belgium) or from the employers' organizations (as in Sweden). Although several countries (e.g.

> France, United Kingdom, Yugoslavia, Belgium) had undergone a recent reorganization of their technical education systems, there is no evidence that any impetus for educational leave of absence came from the education sector itself. There is rather the impression that the education sector was regarded as something quite apart from the idea of educational leave of absence and industrial training. This was sometimes explicitly reflected in the regulations which emerged and formed the basis of the various programs.
>
> The CERI report sums up this point by asserting:
>
> In fact, in all the documents requested by and submitted to the government (United Kingdom) by the various bodies for consideration when drafting regulations on education leave of absence, nowhere do we find a policy statement, nor a request for one, from the traditional education sector.

Thus it appears that in Europe, as in the United States, the educational system has once again neglected the education of adult workers of all ages. There can be no doubt that a significant element in the development of a national strategy for implementing the concepts of paid educational leave, recurrent education, and continuing education in the United States must be a substantial effort to engage the educational system in the process at the earliest possible moment.

Serious consideration of ways to accomplish this should be high on the agenda. The nation has just lived through the Office of Economic Opportunity experience. There is every reason to believe the current manpower crisis will lead to a continuation and expansion of labor department training and education activity. No one agency, private or public, has, can

have, or--for that matter--should have, a monopoly in American education. Undoubtedly coordination among all federal, state and local agencies is essential to success, but the formal school system must be stimulated to carry its share of the planning and administration of the effort to provide a full measure of educational opportunity to workers and their families.

United States President Ford seemed to grasp the necessity for some more viable association of representatives of education and work in our society when he declared himself in support of extending the higher education and vocational education acts in a recent speech at Ohio State University. On that occasion, he called upon students, graduates, and faculties to

> show us how universities can work with industry and labor unions to devise a whole new community of learning across this great land. Accordingly, I have asked the Secretaries of Commerce, Labor and HEW to report to me new ways to bring the world of work and the institutions of education closer together. For your government as well as you, the time has come for a fusion of the realities of a work-a-day life with the teaching of academic institutions.

Thus the President of the United States calls attention to management and labor unions as the second and third significant elements in any effort to develop a national strategy of education for workers.

National Institute for Education Has Initiative for Implementing Paid Educational Leave

It appears, for the moment at least, that the National Institute for Education has the initiative in the United States for developing any consideration of implementing the ILO actions on paid educational leave and for serious introduction of the concept of recurrent education.

United States consideration of the ILO activities on paid educational leave was confined primarily to the tripartite delegation of management, labor and government representatives.

At least three factors influenced the reaction of the United States. (1) The issue of paid educational leave did not appear to be on the collective bargaining agenda, nor was it in the platforms of political parties; (2) The U.S. tripartite delegation understood that the traditional policy of the U.S. toward adopting any ILO convention makes it next to impossible for the paid educational leave convention to be ratified; (3) Throughout the period of discussions in the ILO, there was a growing tension between the United States and the ILO which raised the larger question of the extent to which the U.S. should participate in the ILO itself.

Any consideration of applying to the United States any of the concepts and suggested forms contained in the ILO Convention, Recommendations and Annex (17-17A-17B) must start with the assumption that most American government, labor, and management leaders do not consider paid educational leave as a priority

item, nor can it be expected that many of these representatives have much substantive knowledge of the international discussion of this question.

The question of paid educational leave has not been dealt with in national or state legislation in the United States except in some areas of public employment as discussed above. Nor has there been any vehicle or procedure for labor, management, government and educators to discuss the issue seriously.

National Institute for Education-OECD-CERI Relationship is Useful

The field, therefore, appears open for the National Institute for Education to advance the discussion of paid educational leave in the United States. It is especially fortunate in this regard to have so valuable a source of information and stimulation which comes from its close and useful association with OECD-CERI.

The recent OECD-CERI conference developed informal, cooperative relationships with the ILO working staff whose task it shall be in the coming period to move on to the next stage of ILO activity in this field. Thus the National Institute for Education might not only play a generative role in the United States but, through its connection with OECD-CERI, lead Americans to take part in the discussions, studies, and experimental projects along with the international leaders in the field.

National Institute for Education Working Committee

The next step might be the establishment of a small NIE working committee so that planning and action can be closely related. The committee could be made up of NIE, other government agencies, the AFL-CIO and some of its affiliated unions, the UAW, representatives from management and appropriate representation from education organizations.

The committee might assess the recommendations contained in this paper and any other ideas, set a priority for action and then proceed to seek organizational and political support for legislation or administrative action.

The committee should at the same time give significant attention to activities in the private sector conducted by union and management groups and should find ways to provide these efforts with technical assistance and financial support. Some of the important recommendations outlined above can be developed almost immediately into projects which could be funded by the NIE or other appropriate public or private agencies.

Implementing Recommendations for a National Policy Commission, Council, or Committee

If the recommendation for a national policy commission, council or committee is accepted by them, the working group might explore some seven avenues of approaching the matter.

1. White House Action: This might be accomplished through the White House Labor-Management Committee or through administrative assistants to the President.
2. Congressional Action: Exploratory talks should be held with the appropriate staff members of Congress who are concerned about education and training programs.
3. Interagency Cooperation: Perhaps the Comprehensive Employment and Training Act relationship can be made effective for implementing paid leave concepts and practices. The national manpower policy committee might be a useful vehicle or perhaps some new interagency group would be needed.
4. Management Groups: Exploratory talks should be held with appropriate management leaders to establish mutually cooperative relationships leading to further implementation of paid educational leave and the development of comprehensive educational opportunity programs.
5. Labor Unions: Unions lead the way in many European countries in attempting to implement these issues. Further discussions should be held with the education department of the AFL-CIO. Some international unions have already begun aggressive programs such as the

Educare program of the AFT; the international sabbatical center of the NEA; the UAW effort to relate collective bargaining agreements to associate and degree programs; the ILGWU-STEP program; the ACWA scholarship program; and the operating engineers dual enrollment program. Some coordinated effort by the sponsors of these programs and others discussed in this paper might be achieved with the assistance of the AFL-CIO department of education.

6. Professional Educational Organizations: Discussions should be opened with education-based groups among the community and state colleges, the University Labor Education Association, the Adult Education Association, Vocational Education Association, Urban and Community education departments, schools, or studies programs.

7. Manpower Specialists: There are a host of organizations, private and semi-public, which have grown-up since the War on Poverty which contain outstanding persons of competence and concern for relating education and work. The NIE planning and work group might look into the possibility of cooperative relationships with some of these organizations.

Relationships with State and Local Communities

There are many ways currently available which might be used by a national education and training council to reach into the state and local communities.

The formal school system and its adult education division can be helpful; the state and county manpower committees developing under the Comprehensive Employment and Training Act program can reach labor, management, government and educators; the network of vocational and education advisory councils might be another arena for dialogue; the labor education, management education, and joint labor-management advisory committees in universities and colleges are additional potential arenas for the discussion of advanced concepts and the introduction of experimental programs. The local chambers of commerce, the service clubs and the AFL-CIO state and county councils are other important arenas.

The planning and working committee might sum up its exploratory phase by conducting a conference attended by representatives of the above, and added groups. The question of sponsorship of the conference can be worked out during the exploratory phase. It might be a White House conference, a conference sponsored by a specific agency, or a conference sponsored by all concerned organizations. Included on the agenda might be a discussion of the current new laws attempting to provide training for unemployed persons as well as paid leave, and

recurrent and continuing education. It is conceivable that such a conference can attract significant support, have national impact, and international interest.

Projects of Immediate and General Usefulness

The planning and working group might begin immediately to set up several study and experimental projects with unilateral NIE or interagency funding. These efforts would have validity in their own right and would also be factors enhancing labor, management, educators' and government's interest and attention to the problems. The following are five such projects which might have the greatest impact and which can be efficiently and usefully integrated into a basic data bank or information source for those considering administrative action, legislation at the federal or state level, or those contemplating private unilateral or negotiated educational opportunity plans.

It would seem reasonable to proceed from the assumption that if you wish to interest people you have to start with something which is needed by them.

1. A review and evaluation of management education opportunity programs: Management education and training programs have increased at a phenomenal rate, the amount of money spent is considerable and the amount of available financial entitlement

is staggering in this period of tight budgets. Yet management's needs for education seem to be forever broadening and have long since moved beyond purely job-related, vocational training to the point where basic literacy, high school equivalency, college and advanced degree study are almost, if not, as essential as skill training. Furthermore management has found that the pressure of social forces have drastically affected production and made it imperative that management itself and its employees learn about race relations, the changing work roles of women, the disaffection of youth, the sharing of even more aspects of decision making, and the restructuring of production methods in terms of human engineering. While management has and will continue these educational activities because of their inherent value to the enterprise it must be recognized that much of what is being done has such significant social and individual value that there is some justification for its consideration as a proper responsibility of public education. No one knows the full cost and extent of management training and education. It is suggested that at this time, perhaps more than at any other in our history, management could benefit

from knowing these costs with a view toward using the data to work out a sensible relationship between private and public spending on education and training.

2. A survey and evaluation of labor education in the United States: Similar to the situation in management education, no one knows the extent and financial expenditure of trade unions on education and training in all its variety and complexity. Trade unions are taking a greater interest in all aspects of educational policy and practices as they affect their members and their immediate families. Their concerns include primary and secondary curricula, textbooks, and relationships among students, parents, and teachers. Vocational and technical education and the work of community colleges and universities have all been integrated in one fashion or another, generally on an ad hoc basis, with varying degrees of depth, most often as pressure developed for a specific type of education. Some trade unions have developed outstanding programs in cooperation with management. Others have been financed by government funds such as the excellent Harry Lundberg school for maritime workers. Still others like the AFT have announced their intention to pursue an

educational policy not only for their own members but for all Americans. Unions will be inclined to look with favor on any effort to record and assess the educational work being done in this field.

3. Tuition aid programs: Select two or three major corporations and unions which have negotiated a tuition refund plan and experiment with educational delivery systems designed to increase worker participation in these programs. Since the relationship of labor, management and the education system is so central to any further implementation of paid educational leave, recurrent education, and continuing education, the NIE working group might consider developing three projects designed to stimulate and assist cooperative efforts to make already established programs more successful. A most disheartening fact is the low participation rate in tuition refund plans offered by management or negotiated through collective bargaining. Hundreds of thousands of people are not accepting educational opportunities seemingly available to them and hundreds of millions of dollars appear to be lying fallow--for many years!
4. Education and Training funds: Study the education and cultural training funds negotiated through

collective bargaining and administered by trade unions for the purpose of analyzing participation rates, the quality of participation, and the resulting career patterns either on the job, in the level of union leadership attained, in the social and political life of the community, or in the personal satisfaction achieved. Perhaps the most significant new development in educational opportunity for workers after the rise of the community college is the growing practice on the part of labor unions to negotiate training and education trust funds. These funds are significant because they are relatively large, they are in the control of the unions who are aggressively seeking out and attempting to meet the educational needs of their members, and because their very nature requires management and the education system to be integrated in the conduct and evaluation of the programs.

5. A review and evaluation of government manpower programs: The United States government by categorical expenditure has long been heavily involved in the training and education of the work force. But not much money or effort has been devoted towards experimenting with helping corporations, unions,

and public agencies develop integrated programs of educational opportunity for workers and their families.

Thus it is suggested that an NIE working group might 1) explore the concerns for education and training opportunity programs in the White House, in Congress, and in labor, management and education interest groups; 2) initiate a program of information and education among these groups or within any or all of them as needed and possible so that forums can be provided for practitioners and theorists to discuss their ideas and practices on manpower training and educational opportunity programs with particular emphasis upon paid educational leave, and recurrent and continuing education; 3) fund and help obtain additional funding for five projects of immediate and general utility; 4) fund the further recommendations which appear in section four of this paper as finances and circumstances permit.

VI. CONCLUSION

The unfortunate economic conditions in the United States paradoxically make this an opportune time to expect advancement in concept and practice with regard to training and educational opportunities for workers and their families. New federal and state laws including training components have been passed as emergency measures, one as recently as the week of January 5, 1975. Economic pressures may force extensions of these acts and perhaps a willingness on the part of all segments of society to consider some more rational, long-range national policy including paid educational leave, recurrent and continuing education.

It would seem advantageous for all concerned to take seriously the question of implementing these concepts. The NIE can play a significant role in coordination, planning, research, and experimentation which can help the involved parties establish their own policies and practices which might evolve into a mutually beneficial national policy.

It has recently been asserted by some that American workers are overqualified for their jobs and that they really don't need all the training opportunities that have so far been provided. This pathetic assertion is based upon a fundamental misconception of the depth, variety, and complexity of the educational needs of workers. Perhaps such views can serve

as stimulants to the discussion of the social and economic values placed upon the changing nature of work in American society.

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